

Certified a Regulation (or
Regulations) of the

Department of Social Welfare
(Name of State Agency)

Chas. W. ...
(Signature)

Director
(Title)

9/30/47
(Date)

MAIN OFFICE
SACRAMENTO
616 K STREET
(14)

LOS ANGELES OFFICE
WASHINGTON BUILDING
311 SOUTH SPRING STREET
(13)

SAN FRANCISCO OFFICE
DAVID HEWES BUILDING
995 MARKET STREET
(3)

Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento 14
September 30, 1947

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Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

IN REPLY PLEASE REFER
TO:

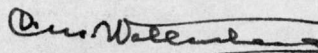
My dear Mr. Jordan:

Attached are three copies of the following regulations
made by the State Department of Social Welfare.

DEPARTMENT BULLETIN NO. 311(ANB&APSB) (Emergency Regulation)
DEPARTMENT BULLETIN NO. 312 (ANC) (Emergency Regulation)

These regulations are filed in accordance with Section
11381 of the Government Code, Chapter 1334, Statutes of 1945.

Very sincerely yours,



CHARLES M. WOLLENBERG, Director
Department of Social Welfare

206:b5
Attachments

RECEIVED
SACRAMENTO, CALIF.

1947 OCT 1 PM 1 54

FRANK M. JORDAN
SECRETARY OF STATE

Certified as a Regulation (or
Regulations) of the

Dept of Social Welfare
(Name of State Agency)

Don Walcott

(Signature)

Director

(Title)

9/30/47

(Date)

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14

August 20, 1947

W41@ Sec 1560
FILED

in the office of the Secretary of State
of the State of California

OCT 1 - 1947

DEPARTMENT BULLETIN NO. 311 (ANB & APSB)

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DEPARTMENTS
COUNTY AUDITORS

At _____ o'clock _____ M.
FRANK M. JORDAN, Secretary of State
By _____
Assistant Secretary of State

Subject: Increase in the Amount of Aid
and Fiscal Changes - Effective October 1, 1947
Aid to Needy Blind
Aid to Partially Self-Supporting Blind Residents

Section 3084 of the Aid to Needy Blind law and Section 3472 of the Aid to Partially Self-Supporting Blind Residents law, Welfare and Institutions Code, have been amended by Chapters 1494 and 1495, respectively, Statutes of 1947. These amendments become operative October 1, 1947.

Under these amendments the maximum grant of Aid to Needy Blind and Aid to Partially Self-Supporting Blind Residents is increased from \$65 to \$75 a month operative October 1, 1947. The grants of current recipients shall be adjusted effective October 1, 1947, to bring the grant of aid into accord with the provisions of the following amended sections.

Section 3084 (relating to Aid to Needy Blind)

"If the county board of supervisors is satisfied that the applicant is entitled to aid under the provisions of this chapter, it shall, without delay, issue an order therefor.

"The amount of aid to which any applicant shall be entitled shall be, when added to the income (including the value of currently used resources, but excepting casual income and inconsequential resources) of the applicant from all other sources, seventy-five dollars (\$75) per month. If, however, in any case it is found the actual need of an applicant exceeds seventy-five dollars (\$75) per month such applicant shall be entitled to receive aid in an amount, not to exceed seventy-five dollars (\$75) per month, which when added to his income (including the value of currently used resources, but excepting casual income and inconsequential resources) from all other sources, shall equal his actual need.

"The aid granted under this chapter shall be paid monthly, in advance, out of such funds as may be designated by the board of supervisors on warrant of the county auditor of the county. Payments of aid shall be commenced as of the first day of the month in which the application is granted, unless otherwise directed by the State Social Welfare Board in cases in which an appeal is taken; but in any event the beginning of aid shall not antedate the date of application."

Section 3472 (relating to Aid to Partially Self-Supporting Blind Residents)

"If the county board of supervisors is satisfied that the applicant is entitled to aid under the provisions of this chapter, it shall, without delay, issue an order therefor. The amount of aid to which any applicant shall be entitled shall be, when added to the net income of the applicant from all other sources, seventy-five dollars (\$75) per month.

"Net income from any of the following sources of a combined total value not exceeding eight hundred dollars (\$800) per annum shall not be considered for any purpose:

- "(a) Income from applicant's labor or services;
- (b) The value of foodstuffs produced by the applicant or his family for his use or that of his family;
- (c) The value of firewood and/or water produced on the premises of the applicant or given to him by another for the applicant's use;
- (d) The value of gifts;
- (e) The value of the use and occupancy of premises owned and occupied by the applicant;
- (f) The net income from real and personal property owned by the applicant.

"Income in addition to the above specified shall be computed on the basis of net income."

Effective October 1, 1947, most recipients will receive a \$10 increase in the grant.

In order that one warrant may be issued in October to cover the full amount payable for that month, and so that the warrant may be delivered without delay, counties may secure action by the board of supervisors in September on increases to be effective October 1, 1947. If it is not possible to issue a warrant for October to cover the full amount payable for that month, supplemental warrants shall be issued as soon as administratively possible after October 1, 1947.

In those very few cases in which the total need of Aid to Needy Blind recipients consists entirely of the cost of nursing home or rest home care which is being met by the current grant plus continuing income, the grant will not be increased provided there is no increase in the cost of such care or decrease in the amount of continuing income.

Example A: ANB recipient is living in a nursing home where all needs are being met at a cost of \$95 a month. The present grant of ANB is \$65 a month and a contribution of \$30 a month is being made by a son, thus supplementing the grant to meet total needs. The cost of care remains at \$95 a month and the contribution of \$30 continues, thus no increase in aid is indicated.

Example B: An ANB recipient is living in a nursing home where all needs are being met at a cost of \$110 a month. The present grant of ANB is \$65 a month and a contribution of \$45 a month is being made by a nephew to meet the total need. The cost of care remains at \$110 a month; however, the nephew reduces his contribution to \$35 a month. ANB will be increased to \$75 a month.

I. Increase effected by reference to payroll.

The amount of the increase to be made can be ascertained by reference to the payroll except in those cases involving need in excess of basic continuing needs. In these so-called "excess need" cases review of the case records will be necessary to insure that proper increases are made effective October 1, 1947.

As a first step in preparing these increases, it is suggested that "excess need" cases be designated on the payroll - an increase of \$10 will then be in order for all cases not so designated.

Reports of increases of \$10 for all recipients, except those whose need is determined on an excess need basis, may be submitted to the State Department of Social Welfare in list form (Temp 134, Rev.) or by use of the Notice of Change (Form Bl 232) for the individual case. If a list is used, it shall be in accord with the attached form (Temp 134, Rev.) and the cases shall be listed in numerical order according to State number. One copy of the list shall be submitted showing action of the Board of Supervisors. When lists are used, proper notation must be made in the county case record for the individual case showing the increase in amount of aid effective October 1, 1947. Use of a rubber stamp is suggested in order to record the following information in the case record:

"Aid increased effective October 1, 1947, to \$ _____ in
accord with amended Sections 3084 or 3472 of the Welfare and
Institutions Code per action of Board of Supervisors on
_____. "
Date

II. Increase effected by reference to individual case records.

If review of the case records is preferred, segregation of the present caseload into the following groups will expedite the task of making the required changes:

A. ANB RECIPIENTS CURRENTLY RECEIVING A GRANT OF \$65 BECAUSE THEY HAVE NO INCOME FROM ANY SOURCE (OTHER THAN CASUAL INCOME)

Aid for each such recipient shall be increased to \$75.

B. ANB RECIPIENTS CURRENTLY RECEIVING A GRANT OF LESS THAN \$65 DUE TO DEDUCTION OF INCOME FROM \$65

There will be a \$10 increase in the grant of each such recipient so that the amount of the grant plus income will equal \$75.

Reports of increases of \$10 to recipients falling in either group A or B above may be submitted to the State Department of Social Welfare in list form or by submission of the usual Notice of Change for the individual case. If a list is used, it shall be prepared in accord with instructions appearing under Item I above. When lists are used, proper notation must be made in the county case record for the individual case showing the increase in the amount of aid effective October 1, 1947, and the date of the Board of Supervisors' action increasing the aid. (See Item I for use of rubber stamp.)

The usual Notice of Change showing the source and the amount of income, etc., must be submitted for every case in which a change in income or need is reported.

C. NEED IN EXCESS OF \$75 - ANB

Since the amendment to Section 3084 (Aid to Needy Blind) provides that \$75 a month is required to meet basic needs, appropriate adjustment must be made effective October 1, 1947, in the grants of individual recipients whose total need is currently determined by adding the cost of special items of need to the cost of basic needs as outlined in Manual Section 156-25.

For each such adjustment in the grant to conform to the amended Section 3084 the usual Notice of Change reporting total need, nature and amount of each excess need, the source and amount of income, etc., and the Board of Supervisors' action shall be submitted to the SDSW. This type of case may not be reported in list form.

D. APSB RECIPIENTS

All Aid to Partially Self-Supporting Blind Residents recipients will receive a \$10 increase in the amount of the monthly grant effective October 1, 1947, unless an adjustment in the grant is required because of income in excess of \$800 a year.

The list form may be used for reporting increases except those cases which may be involved in an adjustment because of income in excess of \$800 in the yearly period. Notice of Change (Form B1 232) is required for any falling within this latter group.

When the income is such that a redetermination of it is normally due, or there is indication that total need, as currently established, may require review, a recheck of both the income and need factors should be made immediately in order that the adjustment in the grant will be correct.

In Aid to Needy Blind the difference between total need and the income represents the amount of aid to which the recipient is entitled except that in no case may the grant of aid exceed \$75, the maximum amount payable to an individual. Likewise, in no case may the grant of aid, plus the income, be less than \$75.

Notification of Right of Appeal (Form Bl 239) : not be forwarded to ANB recipients who are currently receiving a grant of \$65 because they have no income from any source, or to APSB recipients who have not exceeded a yearly income of \$800, and whose grants will be increased to the new maximum (\$75) effective October 1, 1947. (Those whose increases may be reported by submission of a list per Sections I and II of this Bulletin.) Likewise, Form Bl 239 is not required to be sent to ANB recipients whose grants are now determined by subtracting their income from \$65, and who will receive an increase effective October 1, 1947, in order that the grant plus the income will total the new maximum (\$75).

For all other cases in which adjustments are made effective October 1, 1947, the usual Notification of Right of Appeal (Form Bl 239) shall be sent.

Effective October 1, 1947, under amended Sections 3025 and 3087.1 of the Aid to Needy Blind law, the State will pay to the county $\frac{3}{4}$ of the remainder of the sums expended as Aid to the Needy Blind after deducting from the sums so expended the federal share of such payments, except that the State shall pay the county the full amount of aid granted any person otherwise qualified who has no county residence after deducting the federal share of such payment.

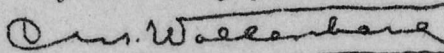
Effective October 1, 1947, under amended Sections 3420 and 3480 of the Aid to Partially Self-Supporting Blind Residents law, the State will pay to the county $\frac{5}{6}$ of the sums expended as Aid to Partially Self-Supporting Blind Residents, except that the State shall pay the county the full amount of aid granted any person otherwise qualified who has no county residence.

These changes in the amount of aid and in the ratio of State and county participation have made some changes necessary on the monthly aid claim forms and in the method of reporting the aid.

NOTE: The change in the ratio of State and county participation effective October 1, 1947, does not affect the amount of institutional subvention to be claimed for October, 1947, and subsequent months on cases which entered the hospital prior to October 1, 1947.

The appropriate sections in the Manual are being revised in accord with the increase in the amount of aid and the change in the ratio of State and county participation.

Very sincerely yours,



CHARLES M. WOLLENBERG, Director
Department of Social Welfare

Forward one copy to
State Department of Social Welfare
Sacramento, California

Date _____

AID TO THE BLIND AUTOMATIC INCREASE LIST
EFFECTIVE OCTOBER 1, 1947

FROM _____ COUNTY

The following recipients of Aid to the Blind are entitled to an automatic increase in aid of Ten Dollars (\$10) per month each, thus raising the grant from Sixty-Five Dollars (\$65) to Seventy-Five Dollars (\$75) per month, or adjusting the grant so that the income plus the Aid totals Seventy-Five Dollars (\$75) per month. These increases are made to conform to the provisions of Sections 3084 and 3472 of the Welfare and Institutions Code, effective October 1, 1947.

This list includes cases in which the only adjustment is the automatic increase as required by law, and not those in which changes in income have occurred, nor those in which income is being allowed to meet need in excess of \$75 a month.

PAGES _____ TO _____ APPROVED BY THE BOARD OF SUPERVISORS

OF THE COUNTY OF _____ ON _____
(Date)

Signature of County Clerk or Deputy

<u>STATE CASE NUMBER</u>	<u>NAME</u>	<u>OLD RATE</u>	<u>NEW RATE</u>
--------------------------	-------------	-----------------	-----------------

(Note: List cases in numerical order according to State Case Number. This form to be used for first page only. Blank sheets may be used for additional pages.)

MAIN OFFICE
SACRAMENTO
616 K STREET

LOS ANGELES OFFICE
WASHINGTON BUILDING
311 SOUTH SPRING STREET

SAN FRANCISCO OFFICE
DAVID HEMES BUILDING
995 MARKET STREET

EARL WARREN
GOVERNOR

STATE OF CALIFORNIA

DEPARTMENT OF SOCIAL WELFARE

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento
October 3, 1947

1297

FILED
in the office of the Secretary of State
of the State of California
OCT 15 1947
At 9:10 o'clock A. M.
FRANK M. JORDAN, Secretary of State
By *Robert H. Jordan*
Assistant Secretary of State

MANUAL LETTER NO. 109

The attached revisions are to be entered in your copy of the Manual of Policies and Procedures and the revision numbers canceled on the separators of the revised chapters. Revision numbers are as follows:

Purpose and General Provisions	Revision 44
Income	Revisions 57 through 60
Amount of Grant	Revision 99
Relatives	Revision 35
Investigation and Decision	Revision 164 through 168
Statistical Procedures	Revision 66
Financial Procedures	Revision 285 through 303

These revisions were approved by the Social Welfare Board on September 26, 1947.

Sec. 101-00 now contains the statement of purposes set forth in Chapter 161, Statutes of 1947 (SB 193).

Sec. 152-90 carries a revision of policy regarding the value to be placed on free board or food received by a recipient of OAS, AMB or APSB. Sec. 153-80 states revised policy on the division of income with a spouse. Sec. 153-60 has been deleted.

Sec. 156-60 has been deleted from the Amount of Grant Chapter.

Sec. 172-00 of Relatives Chapter contains revised policy on the separate income of spouses particularly when the spouses have made an agreement as to earnings.

A number of changes have been made in Sec. 237-75 of Investigation and Decision Chapter because of changes in the law as a result of legislative action. Changed requirements for signing the Certificate of Eligibility will have the effect of making the policies uniform in all aids. The last two pages of this section are being deleted and should be removed from your manual.

There has been a revision and rearrangement of sections dealing with administrative expense in the Financial Procedures Chapter. Secs. 645-00 through 646-80 have been revised. The following sections have been given new section numbers but otherwise have not been changed:

Sec. 645-70 changed to 645-21
Sec. 646-30 changed to 645-51
Sec. 646-60 changed to 645-61
Sec. 645-30 changed to 645-76
Sec. 646-50 changed to 645-96

Secs. 645-26, 645-45 and 645-50 have not been changed.

101-05 PURPOSE AND CONSTRUCTION OF OAS LAW OAS

101-05

The purpose of the OAS law is to provide for aid to the needy aged residing within the State.

The OAS law contemplates a cooperative program of Federal, State, and county aid to provide assistance to aged persons who are without adequate resources for their own care.

The provisions of the law shall be liberally construed. (W&IC 2001, 2003)

<p>OF THE STATE OF CALIFORNIA, COUNTY OF ...</p> <p>... (mirrored text) ...</p>	<p>... (mirrored text) ...</p>	<p>... (mirrored text) ...</p>	<p>... (mirrored text) ...</p>
<p>... (mirrored text) ...</p>	<p>... (mirrored text) ...</p>	<p>... (mirrored text) ...</p>	<p>... (mirrored text) ...</p>
<p>... (mirrored text) ...</p>	<p>... (mirrored text) ...</p>	<p>... (mirrored text) ...</p>	<p>... (mirrored text) ...</p>

101-00 CHART OF CERTAIN PROVISIONS OF THE W. & I. CODE (Cont'd)
OAS, ANB, APSB, ANC

101-00

(THIS CHART IS NOT INTENDED TO BE ALL INCLUSIVE, BUT PRESENTS BRIEF STATEMENTS OF GENERAL PROVISIONS.)

PROVISIONS	OLD AGE SECURITY	AID TO NEEDY BLIND AID TO PARTIALLY SELF-SUP- PORTING BLIND RESIDENTS	AID TO NEEDY CHILDREN
RESIDENCE (CONT'D) B. COUNTY	NO PERIOD REQUIRED PRIOR TO DATE OF APPLICATION FOR ELIGIBILITY TO AID. FOR COUNTY FINANCIAL PARTICIPATION, ONE YEAR OF COUNTY RESIDENCE REQUIRED. (W&IC 2160)	NO PERIOD REQUIRED PRIOR TO DATE OF APPLICATION FOR ELIGIBILITY TO AID. (W&IC 3042, 3432) FOR COUNTY FINANCIAL PARTICIPATION, 6 MONTHS' PERIOD OF COUNTY RESIDENCE IS REQUIRED IF APPLICANT BECAME BLIND WHILE CALIFORNIA RESIDENT; OTHERWISE, ONE YEAR OF COUNTY RESIDENCE REQUIRED. (W&IC 3040, 3041, 3430, 3431)	NO PERIOD REQUIRED PRIOR TO DATE OF APPLICATION FOR ELIGIBILITY TO AID. (W&IC 1512, 1526D, 1557) FOR COUNTY FINANCIAL PARTICIPATION, ONE YEAR OF COUNTY RESIDENCE REQUIRED EXCEPT IN CASE OF FOUNDLING OR CHILD WHOSE APPLICATION IS FILED BY INSTITUTION MAINTAINING HIM. (W&IC 1526)
SOLICITATION OF ALMS		NO PERSON WHO PUBLICLY SOLICITS ALMS IN THIS STATE IS ELIGIBLE FOR AID. (W&IC 3046, 3446)	
TRANSFERS, INTER-COUNTY	RECIPIENT WHO MOVES FROM ONE COUNTY TO ANOTHER WITH INTENT TO RESIDE IN SECOND COUNTY SHALL BE ENTITLED TO CONTINUANCE OF AID BY FIRST COUNTY FOR ONE YEAR. AID SHALL THEN BE PAID, IF ELIGIBILITY CONTINUES, THROUGH THE COUNTY IN WHICH RECIPIENT HAS ATTAINED RESIDENCE. (W&IC 2200)	RECIPIENT WHO MOVES FROM ONE COUNTY TO ANOTHER WITH INTENT TO RESIDE IN SECOND COUNTY SHALL BE ENTITLED TO CONTINUANCE OF AID BY FIRST COUNTY FOR ONE YEAR. AID SHALL THEN BE PAID, IF ELIGIBILITY CONTINUES, THROUGH THE COUNTY IN WHICH RECIPIENT HAS ATTAINED RESIDENCE. (W&IC 3090, 3450)	CHILD WHOSE RESIDENCE IS CHANGED FROM ONE COUNTY TO ANOTHER SHALL BE ENTITLED TO CONTINUANCE OF AID BY FIRST COUNTY FOR ONE YEAR. AID SHALL THEN BE PAID, IF ELIGIBILITY CONTINUES, THROUGH THE COUNTY IN WHICH THE CHILD HAS ATTAINED RESIDENCE. (W&IC 1527)
STATEMENT OF PURPOSES	THE PURPOSE OF THIS CODE IS TO PROVIDE FOR PROTECTION, CARE AND ASSISTANCE TO THE PEOPLE OF THE STATE IN NEED THEREOF, AND TO PROMOTE THE WELFARE AND HAPPINESS OF ALL THE PEOPLE OF THE STATE BY PROVIDING PUBLIC ASSISTANCE TO ALL ITS NEEDY AND DISTRESSED. IT IS THE LEGISLATIVE INTENT THAT ASSISTANCE SHALL BE ADMINISTERED PROMPTLY AND HUMANELY, WITH DUE REGARD FOR THE PRESERVATION OF FAMILY LIFE, AND WITHOUT DISCRIMINATION ON ACCOUNT OF RACE, RELIGION, OR POLITICAL AFFILIATION; AND THAT ASSISTANCE SHALL BE SO ADMINISTERED AS TO ENCOURAGE SELF-RESPECT, SELF-RELIANCE AND THE DESIRE TO BE A GOOD CITIZEN USEFUL TO SOCIETY. (W&IC 19)		

153-40 (Continued)

153-40

inclusive would indicate the receipt of a lesser amount than that awarded by the court:

1. A showing that the court order is not enforceable because the person ordered to pay is unable to do so;
2. The court granting the award no longer has jurisdiction;
3. A showing that a request has been made of the court for enforcement of the order. (W&IC 1560, 2140, 3075, 3460)

153-50 ALLOTMENTS FROM INMATES OF PENAL INSTITUTION
OAS, ANB, APSB, ANC

153-50

Allotments from inmates of penal institutions as provided in Secs. 2763 and 2780 of the Pen. C. shall be considered as income in the month received and adjustment of the grant made according to the policy of the respective category of aid.

Sec. 2763 of the Pen. C. requires that the State Department of Public Works shall pay the dependents on OAS, ANB, APSB or ANC of an inmate employed in a State prison road camp, a monthly sum from the net credit to each inmate's account as provided below. The amount paid shall be that which the State Department of Public Works estimates will equal, but not exceed, two-thirds of his total credit during the period of his employment. Immediately prior to, or upon the termination of, the employment of any inmate for any reason, any additional payment necessary to bring the total amounts paid to such dependents up to two-thirds of the inmate's net credits shall be made. No payment shall be made to dependents until there is a net credit to the inmate's account of at least \$25. No payment shall be made to dependents which will reduce the net credit below the sum of \$25. When an inmate's dependents are not receiving aid the inmate may voluntarily designate the persons to receive his allotment.

Under the provisions of Sec. 2780 of the Pen. C., the Divisions of Forestry, Parks, and Fish and Game of the Department of Natural Resources and the Division of State Lands in the Department of Finance may use inmates of State penal institutions in camps. Federal officials may also use inmates of State penal institutions to perform necessary and proper work in national forests and parks.

When inmates are paid for their labor under Sec. 2780 of the Pen. C., the Prison Board shall monthly pay two-thirds of the net credit to each inmate's account, to those dependents who are receiving OAS, ANB, APSB or ANC. When the dependents are not receiving one of these forms of aid such inmate may, by signing a written order, direct the Prison Board to pay an amount, not exceeding two-thirds of his net credit to such dependents as he designates, according to Pen. C., Sec. 2784. It further provides that when an inmate is discharged, while at a camp, all sums due him shall be paid upon release. When an inmate is returned to a penal institution or released on parole, his net credits shall be paid to the warden of his penal institution and by him paid to the inmate, as prescribed by the Prison Board.

The California Institution for Men at Chino is the only penal institution which has a forestry camp at present. Pending establishment of other camps, Folsom, San Quentin and the road camps connected with these institutions are assigning inmates to combat fires in emergencies on a day to day basis.

(Section Continued on Next Page)

152-90 VALUE OF CONTRIBUTIONS IN KIND
OAS, ANB, APSB

152-90

The value placed upon rent, utilities, food or other items of support contributed in kind to an applicant may not be in excess of an amount which will permit the recipient to meet his other needs, such as incidentals, transportation, etc. Due consideration shall be given to the value of items of need which are contributed in kind. However, the value placed upon free rent and utilities shall not exceed \$15 a month. The value placed on free food shall not exceed the current OAS budget figure for that item reduced to the lowest whole dollar. When free room and board are provided the value shall be the sum of the values placed upon free food and free rent and utilities. (W&IC 2140, 3075, 3460)

153-00 INCOME IN KIND IN ANC
ANC

153-00

A resource in kind, which is received with sufficient regularity to be counted on for meeting basic continuing needs, may be considered income to the family budget unit when a reasonable evaluation of such resource has been determined on a monetary basis. Home produced foods for use of the family only and the value of free clothing and household linens, etc., need not be considered income. When income in kind is a total budgetary item, such as free rent and free board, no evaluation need be placed on them as such items do not appear in the budget for the family. (SEE SEC. 158-10, DETERMINATION OF NEED AND THE AMOUNT OF GRANT FOR CHILDREN IN THE FAMILY GROUPS.) (W&IC 1560)

153-10 GIFTS AS INCOME
OAS, ANB, APSB

153-10

Gifts in cash or the value of items of support in kind such as board, room, clothing, etc., received from others, including public or private agencies, fraternal, benevolent and non-profit organizations, or private institutions having no legal obligation for support, represent income. In OAS and ANB gifts which have no significance in meeting the continuing needs of the recipient and which have been determined to represent casual income shall not be considered in determining the grant of aid. In APSB, when gifts are received the value thereof is subject to the \$800 exemption. (SEE SECS. 150-50, TYPES OF CASUAL INCOME, AND 152-60, OFFER OF SUPPORT AS INCOME.) Gifts of items of personal property such as the gift of a radio, refrigerator, chair, etc., do not represent income. (W&IC 2020, 2140, 3075, 3084, 3460, 3472)

153-40 INCOME FROM COURT ORDERS
OAS, ANB, APSB, ANC

153-40

When there is a court order for full or partial support of the applicant or recipient (or the child in ANC) he shall be presumed to have income in the amount awarded by the court. This presumption shall be considered to have been rebutted where the amount received as a result of the court order is less than the amount so ordered and only the amount received shall be considered income.

The case record shall show the date and provisions of the court order. When a determination is made that no amount or a lesser amount than that awarded by the court is received, the case record shall show the facts upon which that determination is based. The following situations although not necessarily all-

(Section Continued on Next Page)

153-50 (Continued)

153-50

In OAS, ANB and APSB allotment checks shall be made out by the Department of Public Works or the penal institution to the recipient of aid. In ANC, these checks shall be made to the payee when the child is living with the mother or a relative, or to the county when the child is living in a boarding home or institution.

Allotments to persons, other than responsible relatives, are voluntary and are initiated solely on the request of the prisoner himself. After the prisoner signs the form requesting such an allotment Prison Camps, Division of Highways, or the penal institution obtains an affidavit from the allottee giving the relationship to the prisoner.

Information regarding voluntary allotments in an individual case may be obtained from Prison Camps at the above address or from the warden or superintendent of the penal institution for inmates employed under Sec. 2780.

The county is notified of date and amount of each allotment check by the State Department of Public Works or the penal institution. The county is also notified when the prisoner leaves camp. (W&IC 1500, 1501, 1560, 2140, 3075, 3088, 3460, 3474)

153-50 (Continued)

153-50

When a recipient of aid is known to be a dependent of an inmate employed in a State prison road camp or under provisions of Sec. 2780 of the Pen. C., the county shall verify the amount of allotment, if any.

Dependents are relatives for whose support the convict is legally responsible. See Sec. 170-00, Relatives - Statutory Provisions. In ANC, the mother is not deemed to be receiving ANC for herself. Therefore, since the children are the only persons receiving ANC, the father is the only relative to whom these provisions of the Pen. C. apply, and mandatory allotments may not be made to brothers and sisters of inmates.

When a responsible relative (in ANC, a parent) is an inmate of a State penal institution, the county shall inform the institution that the inmate has a dependent who is receiving aid. See Sec. 193-30, Classification of Half Orphan, P.C.I., for necessary verifications in ANC. Notification of any assignment to a road camp or under the provisions of Sec. 2780 of the Pen. C. shall be requested.

When a responsible relative is in a prison road camp the county shall advise Prison Camps, Division of Highways, P.O. Box 1499, Sacramento, California, of the name of the recipient (in ANC the payee or in BH&I cases the county) to whom the allotment shall be paid.

When the county is advised by a penal institution that an inmate is employed under the provisions of Sec. 2780 of the Pen. C. and of the amount credited to the dependents, the county shall, in turn, give the warden or superintendent of the penal institution the name of the person to whom the allotment shall be paid.

The county shall notify Prison Camps, Division of Highways, or the penal institution when aid is discontinued for a person receiving mandatory allotments from an inmate's road camp earnings or under provisions of Pen. C. Sec. 2780.

Allotments are usually not available until the prisoner has been in camp four months. Allotments are not regular, and are variable in amount, depending upon the number of days worked, cost of maintenance and deductions for commissary purchases.

(Section Continued on Next Page)

153-80 (Continued)

153-80

When the recipient has separate income from any source, the total amount of such net income must be applied toward his own need and no portion may be allocated to the spouse whether eligible or ineligible. (For exception see discussion on allocation of OASI benefits below.)

When an ineligible spouse has separate income from any source no portion of such income may be arbitrarily considered as income to the recipient. The extent to which the applicant or recipient is actually in receipt of assistance from such spouse, either in cash or in kind, shall be determined on the basis of the contribution actually received. (The legal liability of the ineligible spouse whose income is his or her separate income, is determined in accord with the Responsible Relative's Scale. See Sec. 172-00)

Separate income is that received from real or personal property representing the separate property of the owner. It also includes income resulting from employment or military service rendered prior to the present marriage such as civil or military pensions except that if the marriage took place during the period the service was rendered the income shall be considered community income. When spouses enter into an agreement, either oral or written, whereby the applicant or recipient relinquishes his interest in the spouse's earnings, the income of the spouse shall be considered separate income from the date such agreement was made. In the event it is determined that the agreement was made for the purpose of qualifying for aid or for a greater amount of aid, the income from the spouse's earnings shall be treated as the community income of the couple.

When a male recipient is receiving OASI benefits the apportionment to his wife shall not continue after she has reached the age of 65 at which time she becomes eligible by virtue of her husband's "primary benefits" to payments in her own right, provided: (1) she is the mother of a child of the recipient, or (2) she was married to the recipient at least thirty-six calendar months before the month in which she filed application for benefits.

However, if the spouse files a claim for OASI benefits immediately when eligible to do so, apportionment may continue until the spouse receives an award. If the spouse refuses to file a claim apportionment shall not continue after the month in which she reaches her 65th birthday. If the wife does not qualify for benefits as provided above her husband may continue to apportion up to one-half of his benefits to her even though such benefits are his separate income.

When a serviceman's allowance is received by either of a couple, the ineligible spouse (unless otherwise stipulated by the serviceman) may be allotted as much thereof as is necessary for his own support. (See Secs. 151-65, INCOME FROM SERVICEMEN'S DEPENDENTS ALLOWANCE ACT, AND 151-30, DEFINITION OF EXEMPT INCOME IN APSB.)

(AGO NS5164, 5187; W&IC 2003, 2020, 2140, 2142.5, 3075, 3084, 3460, 3472)

153-70 INCOME FROM PRIVATE AGENCIES OR OTHER SOURCES
OAS, ANB, APSB, ANC

153-70

Income currently received from a private social agency or other source such as a fraternal or benevolent association or service club shall be verified prior to the granting of aid. The extent of future participation in the support of the applicant or recipient or the date when the present income will terminate shall be verified. (SEE SEC. 233-25, VERIFICATION OF INCOME.) Determination shall be made as to whether the income is regular fixed income or in ANC, small intermittent income, or in OAS, ANB and APSB, casual and inconsequential income. (W&IC 1560, 2140, 3044.5, 3075, 3460)

153-80 DIVISION OF INCOME WITH SPOUSE
OAS, ANB, APSB

153-80

The proper division of income with a spouse is subject to the following considerations:

First: Is the income separate or community? (SEE SECS. 152-00, 172-00)

Second: Is the income derived from earnings (either present or past) or from property (either real or personal)? (SEE SECS. 152-00, 152-20, 172-00)

Third: When the income is derived from earnings (present or past) is it due to the work of the recipient or of the ineligible spouse? (SEE SEC. 152-50)

When the recipient has community income from current earnings, or resulting from past employment (civil and military pensions, OASI, or regular payments received because of industrial or unemployment compensation laws, etc.), he may allocate to his spouse a portion of such income. The amount allocated shall not exceed one-half of the income, and it shall not exceed a reasonable amount necessary for the support of the spouse, as determined by investigation in each individual case. No allocation of such income may be made for the support of minor children. In APSB, no allocation shall be made to the spouse until the recipient has had his full maximum of \$800 (yearly) exempt income. (SEE SEC. 157-15, METHOD FOR DETERMINING AMOUNT OF GRANT IN APSB)

When an ineligible spouse has community income from current earnings, or resulting from past employment (civil and military pensions, OASI, or regular payments received because of industrial or unemployment compensation laws etc.), he may retain an amount of such community income sufficient for the support of himself and/or minor children. After allowance is made for the needs of the ineligible spouse and minor children, the balance shall be allocated to the recipient. However, if the needs of the ineligible spouse and minor children amount to less than one-half of the net income, one-half of such income shall be allocated to the recipient.

Net income from real and personal community property shall be shared equally with the spouse whether eligible or ineligible. (SEE SECS. 152-00 AND 152-20)

(Section Continued on Next Page)

157-05 (Continued)

157-05

5. The value of the use and occupancy of premises owned and occupied by the applicant;
6. The net income from real and personal property owned by the applicant. Income in addition to the above specified shall be computed on the basis of net income. (W&IC 3472)

Free board and lodging supplied to an applicant for APSB because of his necessity therefor, by a friend or relative who is not responsible for his support or who is financially unable to support him, shall not be a ground for refusing aid. (W&IC 3449)

The county board of supervisors shall investigate, annually or oftener, the qualifications of the blind persons receiving aid under the provisions of this chapter and may increase or decrease the allowance within the limits prescribed in this chapter, or, if the board is satisfied that any person receiving such aid is not entitled thereto, it shall deny him further aid and shall forthwith notify the county auditor and the Chief of the Division for the Blind in the SDSW of such action. The person receiving aid however, shall have the right of appeal to the SSWB from such action. (SEE SECS. 151-30, DEFINITION OF EXEMPT INCOME IN APSB, AND 157-15, METHOD FOR DETERMINING THE AMOUNT OF GRANT IN APSB.) (W&IC 3089, 3460)

Every person administering aid shall endeavor at all times to perform his duties in such manner as to secure for every blind person the maximum amount of aid to which he is entitled.

157-15 METHOD FOR DETERMINING THE AMOUNT OF GRANT IN APSB
APSB

157-15

After the exempt income exceeds \$800 in a given year, an adjustment shall be made in the amount of aid and the total net income including aid shall not exceed \$75 per month (SEE SEC. 361-15, ADJUSTMENT IN AMOUNT OF GRANT IN APSB) for the balance of the year. Exception: If the recipient is making an allocation to a spouse, no adjustment shall be made until the support of the spouse has been met, but in no event shall the amount allocated to the support of the spouse exceed \$800 in any given year. Such allocation shall not be made until the recipient has had his full maximum of \$800 exempt income. (SEE SEC. 153-80, DIVISION OF INCOME WITH SPOUSE.)

An APSB recipient may have net income up to \$800 from exempt sources without affecting the maximum monthly grant of aid, unless a smaller grant must be given because of general relief which is granted for any part of the period covered by the first APSB warrant. (SEE SEC. 610-90, DUPLICATION OF GR (ALSO KNOWN AS IN) AND CATEGORICAL AID PAYMENTS)

An applicant (including original applications, restorations, transfers from ANB, and reapplications) for APSB who has a regular monthly net income in excess of \$141.67 a month from the various sources of allowable income (see Sec. 157-05, Provisions of W&IC Regarding Determination of Amount of Grant in APSB) is deemed to have income sufficient to provide a reasonable and decent standard of living and is ineligible to aid, even though he has a spouse without other means of support. (W&IC 3460, 3472)

156-50 (Continued)

156-50

The following are types of income which may be adjusted to whole dollars:

1. Regular income which is estimated as in the case of the value of a contribution in kind, such as free rent, free board and room, etc. (SEE SEC. 152-90, VALUE OF CONTRIBUTIONS IN KIND.)

EXAMPLE B: A DAUGHTER, IN WHOSE HOME AN ANB RECIPIENT LIVES, CONTRIBUTES HIS SHARE OF THE UTILITY BILL. THIS IS ESTIMATED TO AVERAGE ABOUT \$3.55 A MONTH. THIS ESTIMATE MAY BE REDUCED TO \$3.00.

2. Irregular income of such a nature that consideration of the income received in the past is the only possible way of estimating the amount the recipient might reasonably expect to receive in the future. That amount which represents the monthly average over the preceding three months' period reduced to the nearest whole dollar may be deducted in determining the grant.

EXAMPLE C: A RECIPIENT OF ANB NOT ELIGIBLE FOR APSB (SEE SEC. 233-50, VERIFICATION OF PLAN FOR SELF-SUPPORT, AND SEC. 121-10, BLIND WHILE NOT A RESIDENT OF CALIFORNIA), TUNES PIANOS AND HIS EXACT INCOME FROM MONTH TO MONTH CANNOT BE FORETOLD. INCOME OVER THE PAST THREE MONTHS HAS BEEN AS FOLLOWS: JUNE EARNINGS \$9.50, JULY, EARNINGS \$3.00, AUGUST EARNINGS \$12.75, TOTAL EARNINGS \$25.25 OR AN ACTUAL MONTHLY AVERAGE OF \$8.42. THEREFORE, \$8.00 IS DETERMINED TO BE THE RECIPIENT'S AVERAGE MONTHLY INCOME.

3. Grants of aid may usually be kept in whole dollar amounts when a case involves both fixed and adjustable income.

EXAMPLE D: AN ANB RECIPIENT FOR WHOM THERE IS NO ESTABLISHED NEED IN EXCESS OF \$75 IS FURNISHED FREE UTILITIES BY A DAUGHTER THE VALUE OF WHICH IS ESTIMATED AT APPROXIMATELY \$4.35 A MONTH. IN ADDITION HE RECEIVES OASI IN THE AMOUNT OF \$21.85 EACH MONTH. THE ESTIMATED INCOME MAY BE LOWERED TO \$4.15 WHICH, WHEN ADDED TO THE FIXED INCOME OF \$21.85, ADJUSTS THE TOTAL INCOME TO \$26.00.

When reporting income on the Certificate of Verification of Eligibility (Form B1 201) and the Notice of Change (Form B1 232), the amount of income used in arriving at the amount of the grant should be reported. (W&IC 3075, 3084)

157-05 PROVISIONS OF W. & I, CODE REGARDING DETERMINATION OF AMOUNT OF GRANT IN APSB
APSB

157-05

The amount of aid to which any applicant for APSB shall be entitled shall be, when added to the net income of the applicant from all other sources, \$75 per month. Net income from any of the following sources of a combined total value not exceeding \$800 per annum shall not be considered for any purpose:

1. Income from applicant's labor or services;
2. The value of foodstuffs produced by the applicant or his family for his use or that of his family;
3. The value of firewood and/or water produced on the premises of the applicant or given to him by another for the applicant's use;
4. The value of gifts;

(Section Continued on Next Page)

172-00 (Continued)

172-00

When the relative's sworn statement indicates that his net income is such that he would ordinarily have a degree of liability, but that he will not contribute in the amount fixed by the Relatives' Contribution Scale, due consideration shall be given to the special circumstances which the responsible relative may have listed as reason for not contributing according to the scale. In unusual cases the relative may be found to have a degree of liability less than that fixed by the Relatives' Contribution Scale. In some cases there may be a finding of no liability. (W&IC 2181)

The granting of, or continued receipt of, aid shall not be contingent upon the filing of a sworn statement by a spouse or adult child or upon recovery of aid granted from a responsible relative.

When an initial request for a sworn statement has been forwarded to the responsible relative and no reply has been received by the time other items of eligibility have been established, action on the application shall be taken by the board of supervisors without further delay, provided the nonreceipt of a contribution from the relative at the time the application is ready for action has otherwise been established. Such fact may be established by the applicant's signed statement in letter or other form. His written statement is not required if information secured from the applicant or others during the investigation seems reasonable basis for concluding that no contribution is received, but the basis for such conclusion shall be recorded. The county shall make continued effort after aid is granted to obtain a sworn statement from the responsible relative living within the state.

When a spouse of the applicant or recipient has separate income (as distinguished from community income), such spouse's degree of legal responsibility for support, for which recovery action can be initiated, shall be measured by the scale. Separate income is that received from real or personal property representing the separate property of the owner. It also includes income resulting from employment or military service rendered prior to the present marriage, such as civil and military pensions except that if the marriage took place during the period the service was rendered the income shall be considered community income.

When spouses enter into an agreement, either oral or written, whereby the applicant or recipient relinquishes his interest in the spouse's earnings, the income of the spouse shall be considered separate income from the date such agreement was made. In the event it is determined that the agreement was made for the purpose of qualifying for aid or for a greater amount of aid the income from the spouse's earnings shall be treated as the community income of the couple. (See Sec. 153-80, Division of Income with Spouse)

The extent to which the recipient or applicant is actually in receipt of assistance, either in cash or in kind, from a spouse whose income is separate income, shall be determined on the basis of the contribution actually received.

(Section Continued on Next Page)

172-00 (Continued)

172-00

b. Commercial enterprise, such as business or farm operations:

Normal expenses of operating a business, including overhead, represent deductible items in determining the net income of the relative. That expense which is necessary to maintain a business on an operating basis and to preserve the capital investment is given consideration in determining net income. Necessary business and operating expenses which are past due and unpaid represent an obligation of the business to be recognized in determining net income from a business.

In the case of farm operation, for example, the cost of taxes, interest, and principal payments on encumbrances, and depreciation on equipment, should be considered. When an automobile or other motor vehicle is maintained for the business, reasonable expense for its operation should be deducted in determining the net income.

c. Commissions:

Overhead and operating expenses are considered in determining net earnings derived from commissions. This includes such items as the maintenance and operation of an automobile used in connection with the business, office rent, telephone, stationery, etc.

Living expenses shall not be deducted when determining net income.

When the sworn statement indicates that the responsible relative is already contributing and/or will contribute an amount equal to that fixed by the Relatives' Contribution Scale, or when the affidavit indicates his income is such that no contribution may be required under the scale, no further inquiry shall be made into the relatives' financial circumstances unless there is information to refute the relative's statement of financial circumstances. (See Sec. 172-02, RELATIVES' CONTRIBUTION SCALE.) In the presence of information which appears to refute the sworn statement, it is expected that the county will exercise reasonable diligence in investigating further the financial circumstances of the relative.

(W&IC 2:40)

(Section Continued on Next Page)

237-75 (Continued)

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Eligibility Requirements

How Verified

9A. Property owned by parents and/or child (ren). (See Sec. 135-40)

(1) Record verified total county assessed value of all combined real property owned by parent, parents and/or child or children after deducting all encumbrances of record. If investigation verifies that parent, parents, and/or child/children owns no real property record "None".

EXAMPLE A:

9A

(1) REAL PROPERTY, ASSESSED VALUE \$450
(LESS ENCUMBRANCES OF RECORD)

EXAMPLE B:

9A

(1) REAL PROPERTY, ASSESSED VALUE \$1250
(LESS ENCUMBRANCES OF RECORD)

EXAMPLE C:

9A

(1) REAL PROPERTY, ASSESSED VALUE \$NONE
(LESS ENCUMBRANCES OF RECORD)

EXAMPLE D: (IF CHILDREN WHOLE ORPHANS)

9A

(1) REAL PROPERTY, ASSESSED VALUE \$NONE
(LESS ENCUMBRANCES OF RECORD)
(2) Record verified value of cash or securities owned by parent, parents, and/or child or children. (See Secs. 143-05, 233-00.) (If face value of non-exempt insurance policies is used in determining the value of personal property, include face value in total of cash and securities. See Sec 143-89, Verification of Insurance.) If verified by investigation that parent, parents, and/or child/children have no personal property record "None".

9B. Evidence verifying property

(1) Refer to the property search, giving date of search and where evidence may be reviewed. Reference to correspondence is added when ownership of property outside the county has been verified. If the children are whole orphans and the investigation does not indicate that a property search is necessary, record "Property search not indicated."

9B

(1) 2 YR. PROP. SEARCH, 1/8/47, CO. FILE

9B

(1) 2 YR. PROP. SEARCH 12/19/46, LETTER
ALA. CO. ASSESSOR 12/16/46, CO. FILE

9B

(1) 2 YR. PROPERTY SEARCH 1/8/47, CO. FILE

9B

(1) PROPERTY SEARCH NOT INDICATED.

(2) Applicant is parent - If a parent declares no personal property, the investigation discloses none, and the parent's signed Authorization for Financial Investigation, Form CA 228, is on file, record, "Parent declared none CA 228 on file."

Applicant is other than parent
If a Form CA 228 signed by the parent or parents is not available (see Sec. 230-35, Authorization and Consent for Investigation), and the investigation discloses none, record: "Declared none - investigation discloses none."

If the investigation discloses possession of personal property, record source of verification, date of verification, and where evidence may be reviewed.

(Section Continued on Next Page)

237-75 (Continued)

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Eligibility Requirements

How Verified

8A. B. and C. Residence - State and Non-County8D. Evidence verifying residence

A. Unless state or county residence differs for any of the children, indicate all children by the name of the first child followed by "et al".

8D1. Record: (1) nature, (2) date, and (3) where evidence verifying state residence may be reviewed. Indicate period of residence verified by the documents. (Exception: When birth evidence as recorded under 6B shows birth in California, cross reference this item to 6B.)

B. Show how state residence is established (i.e., by birth, by parent's residence or by the physical presence of the child. (See Secs. 121-20 and 129-05.)

EXAMPLE A: SEE ITEM 6B.

EXAMPLE B: CONTINUOUS CATHOLIC WEL. BUREAU RECORD FROM 1/8/44 TO DATE OF APPLICATION.

EXAMPLE C: CA 221, 12/18/45, CHILD PHYSICALLY PRESENT IN CALIF. SINCE 8/9/43, Co. FILE.

C. Complete this item for non-county cases only. Record the date on which residence was established in the county of application. (See Sec. 122-15)

8D2. When the child/children has county residence of less than one year, evidence of state and county residence (this includes state residence evidence, Form CA 204, evidence to support CA 204, and Form CA 234) shall be submitted to SDSW with the CA 200 and CA 201. (See Sec. 232-20, Non-County Residence Procedure.) Copies of all evidence should be retained in the county file. If evidence other than an affidavit is used, the original (e.g., a certified copy of a birth certificate) may be retained in the county file and details reported on Form CA 203.

Record "residence evidence attached" for both 8D(1) and (2).

(Section Continued on Next Page)

237-75 (Continued)

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Eligibility Requirements

How Verified

EXAMPLE A:

(1) ABLE TO CONTRIBUTE "Yes"

(2) ACTUAL CONTRIBUTION, \$12.50

EXAMPLE B:

(1) ABLE TO CONTRIBUTE "No"

(2) ACTUAL CONTRIBUTION "None"

(1) VER. FA. WAGES - HALE BROS. 3/1/47 Co.
FILE AND INTERVIEW FA. 4/1/47 Co.
FILE.(2) HOME VISIT TO CARETAKER 3/19/47, Co.
FILE.

(1) CA 245 - 8/16/47 - Co. FILE

(2) CA 245 - 8/16/47 - Co. FILE

11A. Assistance plan-Family budget basis

(SEE SEC. 158-10)

Record: (1) the total budget for the family unit, (2) total net income to family unit, (3) budgetary deficiency (i.e., the difference between the total budget and the total net income to family unit). and (4) the ANC grant.

EXAMPLE:

11A	
(1)	TOTAL BUDGET FOR FAMILY UNIT.....\$25.53
(2)	TOTAL INCOME TO FAMILY UNIT.....56.18
(3)	DEFICIENCY.....69.35
(4)	ANC GRANT.....70.00

11B. Verification and explanation of assistance plan.

Indicate date on which budget was estimated. Record nature, date, and where evidence verifying source and amount of each item of income may be reviewed. The Gen M48 shall not be referred to as verification of income (SEE SEC. 233-25).

EXAMPLE:

(1)	GEN M48, 7/18/47, Co. FILE
(2)	AWARD LETTER, 6/14/47 SOC. SEC. BD. APP'S. POSS.
(3)	GEN M48, 7/18/47 Co. FILE
(4)	GEN M48, 7/18/47 Co. FILE

NOTE - IF THE BUDGETARY NEEDS OF THE FAMILY BUDGET UNIT, LESS FOOD, CLOTHING, AND PERSONAL NEEDS OF THE INELIGIBLE CHILD/CHILDREN ARE SMALLER IN AMOUNT THAN THE MAXIMUM BASIS FOR FEDERAL PARTICIPATION FOR THE ELIGIBLE CHILDREN, ENTER THE ACTUAL FEDERAL MATCHING BASIS UNDER ITEM 11B (4) (SEE SEC. 158-10 AND 627-20)

Assistance plan - Individual child
Basis (SEE SEC. 158-20)

12A. Record: The given name of each child

12B. Record: The total needs of each child opposite the name of the child.

12C. Record: The contribution from parent for each child.

12D. Record: The amount of other income for each child.

12E. Record: The amount of the grant for each child.

12F. Indicate for each child on line following name, date of computation of individual needs and where recorded, and nature, date, and where evidence verifying source and amount of each item of income may be reviewed.

(Section Continued on Next Page)

237-75 (Continued)

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Eligibility Requirements

How Verified

EXAMPLE A:

9A

(2) CASH AND/OR SECURITIES, VALUE..\$57.50

9B

(2) LETTERS 9/7/47 AND 8/31/47 MET. LIFE INS. CO. AND BANK OF AMER. CO. FILE.

EXAMPLE B:

9A

(2) CASH AND/OR SECURITIES, VALUE..\$206

9B

(2) F. V. NON-EXEMPT INS. POL. AND BANK CLEARANCE BANK OF AMER. 9/6/47, Co.FILE.

EXAMPLE C: (IF PARENT IS APPLICANT AND DECLARED NO PER. PROP.)

9A

(2) CASH AND/OR SECURITIES, VALUE..\$NONE

9B

(2) DECLARED NONE-SIGNED CA 228, Co. FILE.

EXAMPLE D: (IF APPLICANT OTHER THAN PARENT AND CA 228 NOT AVAILABLE)

9A

(2) CASH AND/OR SECURITIES, VALUE..\$NONE

9B

(2) DECLARED NONE - INVESTIGATION REVEALS NONE.

(3) Record: "No" if no transfer of either real or personal property was made for the purpose of qualifying for aid.

(3) Since the two-year property search would reveal a transfer or assignment of real property, cross reference to 9B(1) may be entered in 9B(3) to indicate verification of 9A(3). If investigation of personal property indicates no transfer or assignment, record in 9B(3), "Investigation reveals none." (If the investigation shows that a transfer was made but was one which was not in violation of Sec. 135-00, Transfer of Real Property to Qualify for Aid, or of Sec. 146-10, Transfer or Assignment of Personal Property, the facts which resulted in this conclusion shall be included in the county case record.)

10A. Contribution from parent not living with child (See Secs. 158-20, 172-10, 234-05) Under 10A (1) check in appropriate square whether parent is able to contribute. If answer is "yes", record under 10A (2) the amount of the actual contribution.

10B. Evidence verifying ability to support and contribution from parent(s) Record: (1) nature, date and where verification of parent's ability or inability to contribute or support may be reviewed, (2) nature, date, and where evidence verifying amount of contribution may be reviewed.

(Section Continued on Next Page)

237-75 (Continued)

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15. Denial by the Board of Supervisors (See Sec. 250-00)

Record: Name of county, date of action, names of children for whom aid is denied and the reason for denial.

Signature of County Clerk or Deputy

The certificate shall be signed by the county clerk or deputy, or chairman of the board of supervisors. The signature may be either the original or a facsimile.

16. This section is completed by the SDSW.

ADDITIONAL CHILDREN

When an additional child of a family currently receiving ANC on a Family Budgetary Basis is placed on aid by a subsequent Form CA 201, and the payee is the same as for the other children, Item 11, Assistance Plan, shall be completed for all children including those on the first Form CA 201. Items 13 and 14 shall include the names of the children on the first Form CA 201 and Item 14 shall show the full amount of the currently authorized grant.

When the payee for the additional child is not the same as for the children already receiving aid, Items 11, 13, and 14 shall be completed for the additional child only.

When an additional child of a family currently receiving ANC is placed on aid by a subsequent Form CA 201 and the grant is to be computed on an Individual Child Basis, Items 12 through 14 are completed the same as for an initial certificate of eligibility for the additional child only.

(W&IC #560)

237-75 (Continued)

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13. Recommendation of Public Assistance Worker

- A. List the names of the children who qualify for aid. If the beginning date of aid is later than specified under Section 1550 or 1552 of the W&IC, indicate the date from which eligibility is verified and give the reason for ineligibility prior to that date. (SEE SECS. 250-00 AND 611-50)
- B. List the names of the children who do not qualify for aid and give the reason. (SEE SEC. 250-00)
- C. List the names of the children whose eligibility or ineligibility status has not been determined and give the reason county action is withheld. (SEE SEC. 250-00)

Signature of County Public Assistance Worker

The certificate should be signed and dated by the county public assistance worker who makes the recommendation that aid be granted or denied. The signature may be either the original or a facsimile.

Signature of Case Supervisor or Director

The certificate should be signed and dated by the public assistance supervisor or county welfare director. The signature may be either the original or a facsimile.

14. Approval by the Board of Supervisors

Record: Name of county, date of action, and the beginning date of aid. If aid is granted on a family budget basis for all children, list the names of the children and enter the total grant opposite the name of the first child.

If one or more children is receiving foster care, list the name of the child and enter the amount of the individual grant opposite the name of each child. (SEE SEC. 158-20)

If the beginning date of aid differs for one or more of the children, indicate the specific date of aid opposite the name of each child.

Signature of County Clerk or Deputy

The certificate shall be signed by the county clerk or deputy, or chairman of the board of supervisors. The signature may be either the original or a facsimile.

(Section Continued on Next Page)

563-30 (Continued)

563-30

Do not include obligations for medical or dental care, hospitalization, or burials, except payments for such services included in direct money payments which are not separable from payments for other needs. Obligations for medical or dental care, hospitalization, and burials are reported in Part D of Form GR 237. (SEE SEC. 564-50, REPORTING OF OTHER GENERAL RELIEF FROM COUNTY INDIGENT FUNDS.)

Enter in Column I obligations incurred for the benefit of children for whom aid is granted under the Boarding Homes and Institutions program.

Enter in Column II all obligations incurred for the benefit of Family Groups. Include payments for the specific benefit of the child/children for whom aid is granted and also payments for the benefit of any other member of the Family Budget Unit. Do not include aid paid for the benefit of any person in the household who is not a member of the Family Budget Unit; such aid is reported on Form GR 237.

Enter in Column III the sum of Columns I and II.

Item II. Total Obligations Incurred--Enter the sum of Items 11A and 11B.

Item 11A. Total Basis for State Participation--Enter the total amount of obligations incurred for cash payments under each program, excluding county supplemental aid.

The entry in Item 11A, Column I, is comparable to the entry in Item 1, Column A, of the Aid Affidavit (Form CA 800-BHI).

The entry in Item 11A, Column II, is comparable to the entry in Item 1, Column A, of the Aid Affidavit (Form CA 800, revised October, 1946).

The breakdown by source of funds of the payments in which the state participates is given in Items 11A (1), (2), and (3).

(Section Continued on Next Page)

563-20 (Continued)

563-20

Only cash payments within the maximum aid grant established by the OAS, ANB or APSB laws are to be reported on Ag and Bl 237 reports. All payments in kind and cash payments in excess of the legal maximum which are specifically for the OAS, ANB, or APSB recipient are to be reported under Section C of Form GR 237.

OAS

Item 11, Total Obligations Incurred (Form Ag 237) is comparable to the entry in Item 1, Column A, of the Aid Affidavit (Form Ag 800).

Item 11A, Federal share (Form Ag 237) is comparable to the entry in Item 6, Column A, of the Aid Affidavit (Form Ag 800).

Item 11B, State share (Form Ag 237) is comparable to the entry in Item 13, Column A, of the Aid Affidavit (Form Ag 800).

Item 11C, County share (Form Ag 237) is equal to Item 11 minus the sum of the entries in Items 11A and 11B.

ANB, APSB

The sum of the entries in Item 11 (Form Bl 237) for ANB and APSB is comparable to the single entry in Item 1, Column A, of the Aid Affidavit (Form Bl 800).

Item 11A, Federal share (Form Bl 237) for the ANB program is comparable to the entry in Item 6, Column A, of the Aid Affidavit (Form Bl 800).

The sum of the entries in Item 11B, State share (Form Bl 237) for ANB and APSB is comparable to the entry in Item 13, Column A, of the Aid Affidavit (Form Bl 800).

Item 11C, County share (Form Bl 237) is equal to the entry in Item 11 minus the sum of the Federal and State shares (Items 11A and 11B). (W&IC 2140, 3091, AND 3460)

563-30 PART C. OBLIGATIONS INCURRED FOR ASSISTANCE PAYMENTS
ANC

563-30

Section C of Form CA 237 provides for reporting obligations not only for the amount of ANC payments in which the state participates but also for any additional county aid (other than medical or dental care, hospitalization, or burial) given to ANC cases for support of the Family Budget Unit. It includes payments in kind as well as amounts by which cash payments exceed the Basis for State Participation. Counties paying cash supplemental aid in separate warrants should include this amount also.

(Section Continued on Next Page)

Expenditures for salaries and wages, maintenance and operation and capital outlay will be allocated to boarding home and adoption programs under the rules set forth in Sec. 645-71. The following additional rules apply in the reimbursement of both boarding home and adoption administrative costs.

Reimbursement will be allowed on the basis of salaries and wages so allocated, except that any prior agreement with SDSW at the time of issuance of license or as subsequently amended regarding numbers and kinds of positions to be used will be a limitation upon the claim.

Reimbursement for the amortization of the initial cost of construction will be based upon Sec. 645-35; for the cost of repairs and alterations on the basis of Sec. 645-37; for the rental of space or charges in lieu of rent, on the basis of Sec. 645-39.

Reimbursement will be allowed for property and equipment (see footnote for definition) where the amount allocated to boarding home and adoption programs altogether is \$5 or less for each item.

Whenever the amount so allocated is greater than \$5, but the total cost of the item is less than \$50, reimbursement will ordinarily be allowed without specific approval by SDSW.

AD

Whenever the amount so allocated is greater than \$5, and the total cost of the item is greater than \$50, reimbursement will be allowed only on the basis of prior agreement with SDSW or upon submission to SDSW of a satisfactory justification for the partial or entire charges of the cost of the property or equipment to the boarding home and adoption programs.

BHA, BHC

Whenever the amount so allocated is greater than \$5, reimbursement will be allowed subject to a showing of need, at the request of SDSW, for the use of the property and equipment in the boarding home program.

BHA, BHC, AD

The county shall maintain an inventory showing each item of property and equipment for the cost of which reimbursement from state funds in the amount of more than \$5 is claimed. Such items of property and equipment shall be numbered, and the number recorded on the inventory, to allow positive identification of the individual items. When the use to which any such item of property or equipment is placed is essentially different from that agreed upon with SDSW, or in the lack of such agreement, is essentially different from the purpose for which it was purchased, the decrease in value of such property or equipment will be determined and financial adjustment between the state and the county made accordingly.

Note: Property and equipment is defined as those articles which can be used repeatedly without appreciable impairment of physical condition. Machine and fixture parts which, when placed into use, lose their identity and become part of the machine or fixture are not classed as property and equipment, regardless of cost.

(W&IC 1, 1622, 2302)

645-00 FEDERAL PARTICIPATION IN ADMINISTRATIVE COSTS
OAS, ANB, ANC

645-00

Federal participation in county administrative costs is claimed on the basis of one-half of the actually incurred costs of administration for:

- a. Assistance to cases eligible for Federal participation;
and
- b. Recognized services, to individuals or groups of individuals, reasonably related to the categorical aid programs.

The Federal Government does not participate in administrative expenditures for the operation of projects such as commissary stores, woodyards, sewing, shoe repair, and other miscellaneous projects. Administrative expenses for such projects, when included in the county welfare appropriations, shall be included on the administrative expense worksheets and must be reported in the appropriate column. (FSS-ADMIN.)

645-01 ADMINISTRATIVE COSTS - BOARDING HOMES AND ADOPTIONS.
BHA, BHC, AD

645-01

Availability of State Funds

BHA, BHC

Subvention for costs is available from state funds to those cities and counties which have entered into a written agreement with SDSW pursuant to which agreement the agency inspects and licenses specified types of boarding homes. No subvention is available for the costs of accredited agencies which inspect but do not license boarding homes. The amount of subvention for any month may not exceed \$4 times the number of licenses in effect on the first day of the month. (SEE CHAPTER IX, MANUAL - BOARDING HOMES FOR AGED AND CHILDREN.)

AD

Subvention for administrative costs is available from state funds to those counties which have entered into a written agreement with SDSW, pursuant to which agreement the county administers an adoption program.

Reimbursable Expenditures

BHA, BHC, AD

In the administration of the adoption program, over-all reimbursement for any fiscal year will be limited to amounts for salaries and wages, maintenance and operation and capital outlay agreed upon between the county and SDSW. No such agreement on yearly expenditures is required for the subvention on the boarding home programs because of the \$4 per license limitation.

(Section Continued on Next Page)

1. Such services are not performed incident to other public functions;
2. The county has conformed to the requirements of the merit system in the employment of welfare personnel. (SEE CHAPTER 070-00, WELFARE PERSONNEL STANDARDS);
3. Such services are rendered during the period of pending and continuing eligibility and for a reasonable period after the cessation of the money payment.

Costs of services may be reported for purposes of securing Federal matching in respect to:

1. Information, analysis, investigation, consultation planning and referral, including the cost of transportation and other expenses necessary to enable the applicant or recipient to receive technical services in respect to legal, medical and social problems; excluding the cost of legal, medical, educational, rehabilitative and remedial services that go beyond consultation, diagnosis and planning;
2. Costs of mental and physical examinations and other diagnostic services necessary to determine the mental or physical condition of the applicant or recipient or of a member of the household affecting his health and well-being, including expenses necessary to secure the service, but excluding the costs of medical treatment;
3. Costs of services, including consultation and arrangements for counsel, necessary in the adjustment of legal problems of the applicant or recipient of public assistance, including the official fees, the costs of documents and other expenses necessary to secure the service, but excluding attorney's fees and the costs of judicial proceedings except as provided in 4; and
4. Costs of guardianship proceedings for applicants or recipients of public assistance. (FSS-ADMIN.)

645-11 EXPENDITURES FOR WARRANT WRITING SERVICES
OAS, ANB, ANC

645-11

Federal participation may be claimed by the counties in administrative expenditures incurred in the preparation, writing and mailing of warrants for OAS, ANB, and ANC. In all cases the responsibility for the determination of the legality of such claims in respect to county ordinances, rests with each individual county and such determination shall be made prior to claiming Federal participation.

The appropriation from which the expenditures are made shall be the governing factor as to whether Federal participation shall be claimed along with other welfare expenses or whether a "unit cost" is to be used. Expenditures for salaries and wages, postage, envelopes and/or warrants which are made from funds

(Section Continued on Next Page)

645-02 EXPENDITURES FOR PURPOSES OF ADMINISTRATION

645-02

OAS, ANB, ANC

An expenditure for purposes of administration must be for purposes other than "assistance" (cash or kind), must be directly pertinent or reasonably related to the provisions of assistance in the category to which it is allocated and must not be properly chargeable to another program or to any form of assistance as such. (FSS-ADMIN.)

The usual activities involving costs of public assistance administration for which Federal participation may be claimed are:

1. Supervising the operation of public assistance programs;
2. Developing, evaluating and modifying standards of operation;
3. Maintaining social, financial and statistical records;
4. Preparing and presenting information to official bodies and the public;
5. Determining the original and continued eligibility of individuals for financial assistance and ascertaining the amount of assistance to be granted; e.g.:
 - a. The cost of blind eye examinations. (SEE SECS. 180-15, DETERMINATION OF DEGREE OF BLINDNESS; 180-50, REEXAMINATION OF EYES TO DETERMINE CONTINUED ELIGIBILITY, 235-00, PHYSICIAN'S REPORTS OF EYE EXAMINATIONS; AND 645-80, EXPENDITURES FOR EYE EXAMINATIONS.)
 - b. The cost of \$1.00 for search of draft records. (SEE SEC. 107-85, DRAFT BOARD RECORDS AS AGE EVIDENCE.)
 - c. The cost of search of census records, \$1.00 for routine search or \$3.00 provided the circumstances justify a special search. (SEE SEC. 107-65, U. S. CENSUS RECORDS AS AGE EVIDENCE.)
6. Providing such financial assistance. (W&IC 1553, 2186, 3087; FSS-ADMIN.)
7. Recruitment, inspection, licensing and supervision of boarding homes for the aged and assistance rendered clients in selecting a boarding home. (The administration of the Children's Boarding Home program under W&IC Secs. 1620 - 1630 is not subject to Federal participation since the FSS-Act excludes Federal assistance in behalf of children in boarding homes.) (W&IC 2005, 2300, 2311)

645-06 EXPENDITURES FOR PERSONAL SERVICES

645-06

OAS, ANB, ANC

Federal participation may be claimed in monies paid to employees engaged in administration of cases eligible to Federal aid for OAS, ANB, and ANC for personal services rendered the individual applicant or recipient to assure him the maximum benefit from the money payment in relation to personal, family, and community resources provided that the following conditions are true:

(Section Continued on Next Page)

645-11 (Continued)

645-11

6. The unit cost, which will be used for the balance of the fiscal year, is then established by adding the total costs by aid as determined under 1, 2, 3, 4, and 5, above and dividing by the number of recipients of aid (ANC-number of cases) as shown on each assistance affidavit for the month.
7. Each month thereafter the number of recipients of aid, (ANC-number of cases) as reflected on that month's assistance affidavit multiplied by the unit cost for that aid established under 6, will determine the sum to be charged to OAS, ANB, and ANC on the Administrative Expense Maintenance and Operation Worksheet.

No claim for Federal participation for expenditures for services of other agencies will be made on Administrative Expense Worksheets (Forms DFA 64 and 64A) until the grand totals of salaries and wages, maintenance and operation and capital outlay have been determined for the county welfare department. After the grand totals an additional entry will be made for "Expenditures for Services of Other Agencies" and the name of the agencies will be listed with distribution of the charges then being made. These amounts when added to the total cost of the county welfare department then represent the amounts to be carried forward to the affidavits for purposes of claiming Federal participation.

The SDSW shall be consulted as to the method of allocating all non-segregable types of cost of other county agencies for which claim for Federal participation is made. (FSS-ADMIN.)

645-21 EXPENDITURES FOR SERVICES OF OTHER AGENCIES
OAS, ANB, ANC

645-21

Participation may be claimed in amounts expended to cover expenses of other agencies incurred in performing services connected with the administration of public assistance upon a proper showing of any or all of the following conditions:

1. It is the general fiscal practice for an outside service agency performing services directly connected with public-assistance administration either (a) to receive its necessary administrative funds by a charge upon each agency based upon the service rendered, rather than by general appropriation, or (b) to receive a portion of its administrative funds by a charge upon each agency supported primarily by funds derived from sources other than general appropriation;

(Section Continued on Next Page)

appropriated to and expendable by the welfare department shall be claimed according to the approved Plan for Determination of Administrative Expenses in effect in the respective welfare agency. Expenditures for salaries and wages, postage, envelopes and/or warrants which are made from funds appropriated to and expendable by the county auditor shall be claimed according to the plan established for the determination of "unit costs". For example: in some counties the warrants, postage, and envelopes are purchased by the welfare department; the actual writing of warrants, however, is done by the county auditor's office. Since the warrants, postage, and envelopes are an expenditure from the welfare appropriation, they should be charged on the administrative expense worksheets as direct welfare expense. To secure reimbursement for the salaries of county auditor's employees, engaged in the warrant writing and mailing or for any other auditor's office expense or service, a unit cost must be used as these are expenditures from the auditor's appropriation.

The SDSW shall be notified prior to claim of the county's intention so that a joint review may be made for the purpose of determining items eligible for inclusion in the cost figure. The following example is where a unit cost is to be used and includes expenditures for salaries and wages, warrants, postage, envelopes, and the normal monthly cost of addressograph plates and inserts. Those items do not represent the minimum or maximum which may be included in determining the true cost figure.

1. Salaries and Wages. Where salaries of county auditor's employees engaged in preparing and writing aid warrants will be claimed, the approved time recording procedure will be applied. The total number of man hours spent on each aid during the study month multiplied by the average hourly salary, will establish the total salary cost by aids for preparing, writing, and mailing the warrants for the month.
2. Warrants. The cost per warrant determined by the last purchase preceding the study month, multiplied by the number of warrants used by each aid during the month will be the total warrant cost.
3. Postage. The actual cost of postage used in mailing the warrants for the month will be determined for each aid.
4. Envelopes. The cost per envelope determined by the last purchase preceding the study month, multiplied by the number of envelopes used by each aid during the month will be the total envelope cost.
5. Addressograph. The normal monthly cost of addressograph plates and inserts used in the routine preparation of the warrants for each aid during the study month will also be determined. (No addressograph or bookkeeping machine service or repair costs may be included in computing the unit cost.)

(Section Continued on Next Page)

645-26 EXPENDITURES FOR COMMISSARIES
GR

645-26

Commissary costs shall be determined and handled as direct charges to this activity where readily determinable. They may be reported on the Administrative Expense Worksheets (Forms DFA 64 and 64A) under the caption "Commissary" or the OWP column may be used.

Joint expenditures applicable to the categorical aid programs only will be allocated as such.

Only expenditures for Salaries and Wages, Maintenance and Operations, and Capital Outlay by which all welfare programs and the commissary benefit, shall be treated as overall expenses. An example of the latter would be the salary of a county welfare director who is responsible for the operation of all welfare programs including the commissary. (W&IC 1561, 2140, 3091; FSS-ADMIN.)

645-31 EXPENDITURES FOR EYE EXAMINATIONS
ANB

645-31

Federal participation may be claimed for cost of required eye examinations for aid to the blind. (SEE SECS. 235-00, PHYSICIAN'S REPORTS OF EYE EXAMINATION, AND 645-02 EXPENDITURES FOR PURPOSES OF ADMINISTRATION.)

In connection with an application for ANB, the SDSW requires the first examination and if the applicant, at his own expense, submits a second report which is in conflict with the first, then the SDSW requires a third or resolving report. Accordingly, reimbursement may be claimed for the first and third examinations, and any additional examinations which the SDSW may require. If an examination is required at time of reinvestigation and the recipient, at his own expense, submits a second report which is in conflict with the first, a third report is required to resolve the conflict. Reimbursement may be claimed for the first and third such examinations and for any additional examinations which the SDSW may require.

Necessary expenses to county for transporting an applicant for or recipient of ANB to obtain the required eye examination (SEE SECS. 180-15, DETERMINATION OF DEGREE OF BLINDNESS, AND 180-50, REEXAMINATION OF EYES TO DETERMINE CONTINUED ELIGIBILITY) are administrative expenses, subject to Federal reimbursement provided;

1. The applicant or recipient is not financially able to meet such costs, and
2. There is no accessible ophthalmologist on the panel in the county and the person must be transported to another county or state, or

(Section Continued on Next Page)

645-21 (Continued)

645-21

2. The services performed are a distinct and additional function of a type customarily performed as a function of the county welfare department and not a type performed as part of the regular service rendered by such outside agency to other agencies, and a unit of such outside agency performs the service as its sole function and operates as an integral part of the county welfare department;
3. Amounts were expended by a civil service agency for extra identifiable services relating to the establishment and maintenance of personnel standards on a merit basis for the county welfare department as required by rules and regulations of the merit system. They shall include only such special services as are rendered primarily for the county welfare department, and, under existing practice, would not be rendered as a regular service.

The expenditures shall be made from funds appropriated to, earmarked for, or allotted to and expendable by the county welfare department. (W&IC 1560, 2140, 3075; FSS-ADMIN.)

645-25 EXPENDITURES FOR CWS
CWS

645-25

In those counties where contracts have been approved for the employment of CWS workers, the amount of a CWS worker's salary chargeable to CWS shall be determined on the basis of effort expended. If the amount so determined is less than the amount received for CWS from the U. S. Children's Bureau, an amount equivalent to the amount received from the U. S. Children's Bureau shall be charged to CWS and the balance of the worker's salary shall be apportioned among all other programs on the basis of the effort expended excluding CWS.

The minimum amount charged to CWS shall be that amount reimbursed to the county by the SDSW from the U. S. Children's Bureau funds. In those counties where the entire cost is borne by Federal funds, the entire salary shall be included in the CWS category. (FSS-ADMIN.)

**645-37 EXPENDITURES FOR REPAIRS AND ALTERATIONS
OAS, ANB, ANC**

645-37

Federal matching of expenditures for repairs and alterations is based on the assumption that such expenditures are related to the maintenance of proper facilities for the administration of the public assistance programs. The approval of such expenditures is dependent upon whether or not these expenses are necessary for the administration of the assistance programs, are reasonable in cost and soundly planned. The approval or disapproval will in all cases be based on the circumstances of the individual situations.

Before incurring expenditures for repairs and alterations for which reimbursement will be claimed, the following requirements shall be considered:

1. The expenditures must comply with the requirements of State law and Federal regulations.
2. Form DFA-117 (Request for Approval of Expenditures for Repairs and Alterations) shall be completed in detail and four copies submitted to SDSW for approval.
3. Claims for reimbursement are not to be filed for expenditures for repairs and alterations until the county has been notified of approval and of the amount to be claimed.
4. Additional expenditures for further improvements may be required later and these costs, after they have been submitted and approved, may be added to the claim. (W&IC 1560, 2140, 3075, FSSB)

Costs of Repairs and Alterations to Publicly or Privately Owned Buildings.

Federal funds may match the expenditures of local government for alteration and repair of space occupied by public assistance agencies in either private or public buildings if not previously claimed as a part of rent. Matching may be claimed in full at the time the expenditure is incurred, subject to the above provisions. The following principles will govern the matching of expenditures:

1. The benefit of the repairs and alterations must be realized by the public assistance agency within the period of occupancy of the building, commensurate with the extent of cost involved. In the event such benefit is not realized, financial adjustment must be made.
2. The economy of the expenditures must be established by comparison with the amount of rent that would be required for other suitable space of comparable location, construction, facilities, and condition, with particular concern to the adaptability of the space repaired for the use of the public assistance agency.
3. Where space is also occupied by other agencies than the public assistance agency, the cost of the repairs and alterations will need to be allocated on the basis of a reasonable pro rata share, charged to each of the agencies sharing the space. The amount chargeable to the welfare department will be allocated to Overall in the same manner as other costs. (W&IC 1560, 2140, 3075, FSS-ADMIN.)

645-31 (Continued)

645-31

3. Transportation to another county or state is necessary for examination by an ophthalmologist who had not previously examined the person, or
4. The distance to the nearest accessible ophthalmologist in the county on the panel is great and transportation to his office is necessary, or
5. The blind person is bedfast and the cost of transportation of the ophthalmologist to the home of the blind person is incurred by the county, or
6. The blind person requires an attendant to accompany him to the ophthalmologist's office, thus incurring additional expense. (W&IC 3075; FSS-ADMIN.)

645-35 EXPENDITURES FOR CONSTRUCTION OR PURCHASE OF BUILDINGS
OAS, ANB, ANC

645-35

Initial Cost of Construction or Purchase of Public Buildings.

When an agreement provides the basis for defraying the initial cost of construction or purchase of a building to be owned by the local government, and its cost is to be amortized over a period of years as rent charges to the agencies or departments occupying space in such buildings, Federal participation will be available in the amortization of the total cost of construction of new buildings provided:

1. The amount charged for space or the rate of amortization of the purchase price is not in excess of that which would ordinarily be charged in the same or in a similar community for comparable space in a privately owned building.
2. Maintenance and operating services included in the rental charge are clearly specified.
3. Information is provided as to the basis for amortizing the charges to include the total costs of the building, the particular agency's pro rata share, the total square footage to be occupied by each agency or department, the period of years over which the total cost is to be amortized, and the amount per square foot per year based on such period of amortization.
4. Form DFA 117A, Request for Approval of Expenditures for Construction or Purchase of Building, is satisfactorily completed and submitted to the State Department of Social Welfare for their approval prior to commencing construction or purchase. Five copies of this form should be submitted to this office. One copy will be returned to the county after state has acted and passed on the request. (SEE SEC. 646-99) (FSS-ADMIN.)

645-50 COMPUTING LESS THAN FULL MONTHLY SALARY
OAS, ANB, ANC

645-50

When an employee works part-time, or is on pay roll less than a calendar month, whether or not this constitutes the entire period of his employment, his salary, unless on per diem or hourly basis, shall be based on the actual number of calendar days in the month, unless county rules and regulations provide otherwise. Reciprocal tables devised by SDSW may be used for salary computation. Briefly, $\frac{\text{days on pay roll}}{\text{days in the month}} \times \text{monthly salary} = \text{salary or wage due}$.

EXAMPLE A: AN EMPLOYEE HIRED TO BEGIN WORK THE MORNING OF SEPTEMBER 16 AT THE MONTHLY SALARY OF \$90 RECEIVES \$45, COMPUTABLE AS FOLLOWS: $15/30 \times \$90 = \45 .

When an employee works regularly on an intermittent basis at a full monthly rate of pay, his salary may be computed as follows:

$\frac{\text{hours worked}}{\text{work hours in month (actual or average)}} \times \text{monthly salary} = \text{salary or wage due}$.

EXAMPLE B: AN EMPLOYEE WORKS SEPTEMBER 16, 18, 19, 23, 25, 27 AT A MONTHLY SALARY OF \$100 RECEIVES \$26.25 COMPUTED AS FOLLOWS: $42/160 \times 100 = \$26.25$.

When a merit system employee not paid on an hourly or per diem basis is absent without pay on the last work day of the week and returns to work on the morning of the first work day of the following week or the morning after a holiday, he may be paid for Saturday and Sunday or the holiday, if no county-wide ordinance exists to the contrary.

If the employee does not return to work on the morning of the first work day in the week or the morning after a holiday, he may be paid for Saturday and Sunday or the holiday, providing he was not absent without pay on the last work day of the preceding week or on the day before the holiday and there is no existing county-wide ordinance to the contrary.

In no case will an employee be paid for Saturday and Sunday or holiday when he was absent without pay on the last required work day in the week as well as on the first work day of the following week and when he was absent without pay the day before and the day after a holiday.

Summary of County Employees Paid Less than Full Time Monthly Salary (Form DFA 64B) is completed for any employee whose salary is computed under the provisions of this section. (W&IC 1560, 2140, 3075; FSS-ADMIN.)

645-39 EXPENDITURES FOR RENT OF COUNTY OFFICES
OAS, ANB, ANC

645-39

Expenditures incurred by a county government in providing adequate office space for local public assistance operations will generally be expenses for which Federal matching may be claimed.

Rent in Privately Owned Buildings.

Payments of rent, and of service and maintenance costs as defined above, in privately owned buildings will be subject to Federal participation provided:

1. Benefit of the expenditure was received by the state or local public assistance agency; and
2. Payments are in accordance with the cost of comparable space and facilities in the community.

Service and Maintenance Costs in Lieu of Rent in Public Buildings.

Federal participation will be available to meet costs incurred by local governments in lieu of rent; for operating and maintaining space provided for local public assistance agencies in public buildings. Such service and maintenance expense may include costs of heat, light, power, insurance, elevator service, janitor service, cleaning, painting, decorating, and maintenance repairs. These expenses may be charged on the basis of a uniform monthly per square foot charge, provided the unit cost is a reasonable approximation of such expenses over a long-run period, and in no instance would exceed the cost of rent for such space. (FSS-ADMIN.)

645-45 SALARIES PAID DURING PERIODS OF LEAVE OR OTHER ABSENCE
OAS, ANB, ANC

645-45

Claim may be made for salaries paid employees of county welfare department during period of leave with pay in accordance with merit system rules and regulations as set forth in Chapter 070-00, Welfare Personnel Standards.

For each county employee granted leave or other absence in accordance with Merit System rules and regulations there shall be currently maintained the vacation and sick leave record provided on Form DFA 43, County Employee's Monthly Time Record, in the event no other approved record of sick leave or vacation is maintained. The record shall be completed in detail showing available leave at the beginning of the month, increases and decreases during the month and the amount of leave available at the end of the month. The amount of leave available at the end of the month shall then be recorded on the next month's Form DFA 43, or other approved personnel record. (SEE SEC. 645-40, CATEGORIES UNDER WHICH TIME IS RECORDED.) (W&IC 1560, 2140, 3075; FSS-ADMIN.)

**645-61 ABATEMENTS FROM SELF-SUPPORTING ACTIVITIES
OAS, ANB, ANC****645-61**

When a county claims for costs of administration of any activity which is either wholly or partially self-supporting, revenue received from the activity shall be reported to the SDSW as an abatement of expenses applicable to such activity. Any form of abatement, such as rebates, refunds, merchandise returns, etc., shall be reported in the following manner:

The county reports the total amount of the payment to be applied to each month and the programs to be credited, the SDSW makes allocation of costs and adjusts the net amounts on administrative claims for the current month. (FSS-

ADMIN.)

**645-66 EXPENDITURES FOR AUTOMOTIVE PURCHASE AND MAINTENANCE AND
OPERATION
OAS, ANB, ANC****645-66**Purchase

Federal participation may be claimed for expenditures made by the county for automobiles which are to be used by the county welfare department. The purchase price will be listed as a capital outlay item under Gross Expenditures on the Maintenance and Operation and Capital Outlay Worksheet (DFA 64A). The non-allocable portion of the payment (taxes, etc.) shall be posted to Extraneous Expenditures and the allocable portion if not directly allocable to programs will be posted to Over-All Expenditures.

If an automobile has been traded in and a newer one received, the added cost of the transaction may be allocated to Over-All.

The amount of abatement received from transfer of an automobile which is not to be replaced will be handled as an abatement at the date of transfer.

The sale of an automobile will be handled as an abatement of expenses.

Maintenance and Operation of Automotive Equipment

The county welfare department may claim Federal participation for the expense incurred in the maintenance and operation of automobiles used in conjunction with the administration of assistance programs eligible for Federal participation.

In the event the county welfare department draws its vehicles from a county operated "motor-pool", the welfare department may claim for Federal participation for its share of the expense of the "pool" provided the welfare department prorate is made in a manner which equitably and fairly charges them for their share of the cost and provided adequate records are maintained which are readily accessible for audit or review.

Automotive upkeep expense will be listed as a maintenance and operation expense and where not directly allocable to a program shall be posted to Over-All Expenditures and allocated as such. (FSS-ADMIN.)

645-51 EXPENDITURES FOR TAXES
OAS, ANB, ANC

645-51

Under the provisions of the Federal Revenue Code of 1939, county agencies administering public assistance are not required to pay Federal taxes on telephone, telegram, cable and radio messages, electrical energy, automobiles, tires, inner tubes, gasoline, motor oil and automobile parts. Therefore, funds granted for administrative expense may not be used to pay such taxes or to match county funds so expended.

Claim shall not be made for gallonage taxes paid on gasoline or motor oil purchased by county welfare department or for any State and local taxes other than state sales tax paid by county welfare department. Such taxes shall be paid from funds other than those used as county's participation in shared expenses of public assistance administration. (See Sec. 646-80, Forms Used in Administrative Expense Claims, for instructions regarding recording of this information.) This restriction does not apply to participation in reimbursement to county welfare department employees to the full extent of expenses for travel or subsistence even though state and local taxes are included in such expenses. (FSS-ADMIN.)

645-55 EXPENDITURES FOR COST OF MEMBERSHIPS IN ORGANIZATIONS
OAS, ANB, ANC

645-55

Federal participation may be claimed for the cost of memberships in organizations providing services for the advancement of health, welfare and community organization activities, including Merit System Agency membership in organizations providing services for the advancement of personnel administration. These costs will be deemed necessary for proper and efficient administration if these conditions are met:

1. The expenditure is permissible under law;
2. The expenditure is only for agency memberships, not individual memberships;
3. The membership is in a nonprofit international, national, State or local organization;
4. The services provided are reasonably related to the administration of the particular program;
5. The cost of the membership is reasonably related to the value of the services or benefits received; and
6. The expenditure is not for membership in an organization which devotes a substantial part of its activities to influencing legislation. (FSS-ADMIN.)

645-81 CATEGORIES UNDER WHICH TIME IS RECORDED (FORMS DFA 42 AND 43)

645-81

All employees should have a clear understanding of the proper definition of the different programs. The following outline applies in all ordinary situations:

OAS, ANB, APSB, and ANC (Ag, Bl, CA). Time shall be charged to these programs whenever such time is identifiable with an activity which has as its objective the administration of the OAS, ANB, APSB, or ANC law, respectively. Segregation shall be made in ANC and ANB between cases in which Federal participation is or is not involved. Participation shall be claimed only for time and expense allocable to cases in which Federal funds are included in the aid grant.

Aged and Children's Boarding Home Administration (BHA and BHC). Time shall be charged to aged or children's boarding home administration whenever such time has as its objective the administration of aged or children's boarding homes.

GR (formerly IN). Charge time to this category which was spent on activities which have as their objectives the administration of county aid and relief to indigents as set forth in the W&IC.

Child Welfare Services (CWS). Time expended on CWS activities in compliance with a SDSW contract shall be shown under this heading.

Commissary. Time expended in performance of duties primarily concerning commissary affairs shall be reported under the caption "Commissary" in one of the provided columns.

Adoptions. Time expended in performance of duties primarily concerning adoptions affairs shall be reported under the caption "Adoptions" in a provided column.

Other Welfare and Relief Programs (CWP). To this category charge time expended on all welfare activities under the jurisdiction of the county welfare department not otherwise recorded separately. Programs under this heading would include county projects.

War Services Programs. Time expended should be charged in accordance with instructions outlined in the Financial Policies and Procedures Chapter of the War Services Handbook.

Over-all Salary Expense (Ov.). Time shall be charged to this category by administrative officers of the county welfare department and other employees whose duties are of a general nature and whose working time cannot be segregated among individual programs.

(Section Continued on Next Page)

645-76 (Continued)

645-76

time, shall be recorded on Form DFA 42 by employees who work on more than one program and whose duties are such that their time is segregable by programs. Daily copies are submitted to employee's supervisor or time clerk at end of month (with Form DFA 43) for checking as to accuracy. Completed Forms DFA 42 shall be maintained on file in county office for the current and immediately preceding month. (SEE FORM DFA 42 IN SEC. 646-99, ADMINISTRATIVE EXPENSE FORMS.)

2. Employee's Monthly Time Record (Form DFA 43). Time is recorded on this form to the nearest half hour by every county employee whose salary in whole or in part is paid from funds budgeted for the county welfare department and whose name appears on the pay roll of that department. Employees who work on one program only or whose duties are such that no segregation by program can be made of their time are not required to use Form DFA 42 and shall post their time directly to Form DFA 43. Employees who keep Form DFA 42 shall transfer their daily time totals to Form DFA 43, adjusting to the nearest half hour. Provision is made for employees maintaining an individual personnel record for vacation and sick leave. In the event no other approved record of sick leave or vacation is maintained, these records shall be completed monthly showing accumulated vacation and sick leave available at the beginning of the month, additions and deductions during the month and balances remaining at the end of the month which are then transferred to the succeeding Employee's Monthly Time Record. (SEE SECS. 077-06, GRANTING OF SICK LEAVE, AND 077-08, ALLOWANCE FOR VACATION.) After completion of Form DFA 43, it must be signed by the employee and countersigned by the employee's supervisor, who attests to the accuracy of the time record. Copies of Form DFA 43 shall be available for inspection and audit and shall be retained in the county files until authorization for their destruction has been secured from the SDSW. The data on Administrative Expense Work Sheet for Allocation of Expenditures Based on Results of Time Recording (Form DFA 64) are compiled from Form DFA 43. (SEE SECS. 646-70, RULES FOR ALLOCATING ADMINISTRATIVE EXPENSE, AND 646-80, FORMS USED IN ADMINISTRATIVE EXPENSE CLAIMS.) (SEE FORM DFA 43 IN SEC. 646-99, ADMINISTRATIVE EXPENSE FORMS.)

"Title" on Forms DFA 42 and DFA 43, respectively, means the employee's civil service or merit system classification. (W&IC 1560, 2140, 3075; FSS-ADMIN.)

645-71 (Continued)

645-71

Sec. 645-50, Computing Less Than Full Monthly Salary, shall be followed in determining the amount of salary due an employee for periods of less than one month when such employee is not on per diem basis.

Expenditures for maintenance and operation or capital outlay are apportioned as follows:

5. When identifiable with a specific program, charge to that program.

EXAMPLE: THE COST OF A SUPPLY OF GR (FORMERLY IN) FORMS, FOR USE IN THE COUNTY OFFICE, IS CHARGED DIRECTLY TO THE GR PROGRAM

6. When not readily allocable and not included under 5, and applicable to two or more but not all programs, charge as joint expense in the ratio that the total salary cost of each program involved bears to the total salary cost of all programs involved.

EXAMPLE: A TYPEWRITER IS PURCHASED FOR USE ON OAS AND GR (FORMERLY IN) PROGRAMS. THE PORTION OF THE EXPENDITURE CHARGED TO THE OAS PROGRAM BEARS THE SAME RATIO TO THE TOTAL EXPENDITURE THAT THE TOTAL OF THE SALARIES AND WAGES ALLOCATED TO THE OAS PROGRAM BEARS TO THE TOTAL OF ALL SALARIES AND WAGES OF THE OAS AND GR PROGRAMS, ETC.

7. When not identifiable with specific programs, apportion as over-all expenses in the ratio that the total salary cost of each program bears to the total salary cost of all programs.

EXAMPLE: A TYPEWRITER IS PURCHASED FOR GENERAL USE AND NO PORTION OF THE COST IS, THEREFORE, ASSIGNABLE TO ANY SPECIFIC PROGRAM OR ACTIVITY. THE PORTION OF THE EXPENDITURE CHARGED TO THE OAS PROGRAM BEARS THE SAME RATIO TO THE TOTAL EXPENDITURE THAT THE TOTAL SALARY COST OF THE OAS PROGRAM BEARS TO THE TOTAL SALARY COST OF ALL PROGRAMS, ETC. (FSS-ADMIN.)

645-76 TIME RECORDING BY EMPLOYEES
OAS, ANB, ANC

645-76

Salaries and wages paid to employees of county welfare department are apportioned among the programs administered by the department in accordance with the ratio of gross man-hours worked on each program by each employee. The basis of this recording is the maintenance by employees of daily and/or monthly time records. Such time recording by employees is a continuous process and the allocation of time among programs is done individually by all persons whose daily work is identifiable with different programs. (SEE SEC. 646-70, RULES FOR ALLOCATING ADMINISTRATIVE EXPENSE)

The daily and monthly SDSW time recording forms (Forms DFA 42 and DFA 43) provide the necessary facilities for making such a segregation. Any county wishing to substitute a specially designed form to suit its particular needs shall submit the proposed form to the SDSW for approval.

Forms used in recording time are:

1. Employee's Individual Daily Time Record (Form DFA 42). Time is recorded on this form to the nearest five minutes and is totaled by programs at the end of each day for posting to the Monthly Time Record (Form DFA 43). All time worked during a day, including over-
- (Section Continued on Next Page)

645-71 RULES FOR ALLOCATING ADMINISTRATIVE EXPENSE
OAS, ANB, ANC

645-71 |

In determining the proper program to be charged with an expenditure, consideration is given either to the program to which the benefits of the expenditure accrue or to the program necessitating the expense, whichever gives the most logical and equitable relationship between program and expense. All factors are considered and as much expense as possible identified with the individual program, thus insuring the soundest basis for apportionment of joint and over-all charges. The following rules govern the allocation of administrative expenses:

1. Salary of an employee working full time on a specific program is charged to that program.

EXAMPLE: A PUBLIC ASSISTANCE WORKER IS ASSIGNED TO THE ANC-EL PROGRAM AND WORKS FULL TIME ON THAT PROGRAM. HIS SALARY WOULD BE CHARGED DIRECTLY TO THE ANC-EL (CA-EL) PROGRAM.

2. Salary of employee working on two or more programs, excluding supervisors and assistants whose time cannot readily be allocated as direct charges, is apportioned to programs on the basis of the number of man-hours worked on each program, as shown by time reports maintained by the employee.

EXAMPLE: A CLERK IN THE COUNTY OFFICE RECORDS 100 PRODUCTIVE HOURS OF WORK DURING A MONTH, 75 HOURS ON ANC-EL AND 25 HOURS ON ANB-INEL. THEREFORE, 75/100THS OF THE EMPLOYEE'S SALARY FOR THAT MONTH IS CHARGED TO THE ANC-EL PROGRAM AND 25/100THS TO THE ANB-INEL PROGRAM.

3. Salary of employee who works on two or more but not all programs, whose time cannot be readily allocated and who is not included under 2 above, is apportioned as joint salary expense to the programs involved in the ratio that it bears to the total salary cost allocable to each program under 1 and 2, above.

EXAMPLE: A PUBLIC ASSISTANCE SUPERVISOR, GRADE I, SUPERVISES PUBLIC ASSISTANCE WORKERS ASSIGNED TO OAS, ANB-EL AND ANC-EL. THE PORTION OF THE SUPERVISOR'S SALARY TO BE CHARGED TO THE OAS PROGRAM WILL BEAR THE SAME RATIO TO HER TOTAL SALARY AS TOTAL SALARY COST ALLOCATED TO THE OAS PROGRAM BEARS TO THE TOTAL SALARY COSTS ALLOCATED TO THE OAS, ANB-EL AND ANC-EL PROGRAMS.

4. Salary of employee performing duties where none of his working time, or a negligible portion thereof, is identifiable with specific programs, is apportioned as over-all expenses in the ratio that the total salary cost of each program bears to the total salary cost of all programs, as ascertained under 1, 2 and 3, above.

EXAMPLE: AN ACCOUNTANT HANDLES THE ACCOUNTING FOR ALL ACTIVITIES OF THE COUNTY WELFARE DEPARTMENT. THE PORTION OF HIS SALARY CHARGED TO THE OAS PROGRAM BEARS THE SAME RATIO TO HIS TOTAL SALARY THAT THE TOTAL SALARY COST OF THE OAS PROGRAM (EXCLUDING OVER-ALL SALARIES) BEARS TO THE TOTAL SALARY COST OF ALL PROGRAMS (EXCLUDING OVER-ALL SALARIES), ETC.

(Section Continued on Next Page)

645-96 REPORTING OF COST OF ADMINISTRATION
OAS, ANB, ANC

645-96

Reporting of administrative expenditures should be effected by the cash flow method; that is, upon the basis of bills paid during the month irrespective of the month to which the particular expense is applicable. Reporting of expenditures based upon budget encumbrance or obligations incurred is not preferred for the purpose of claiming reimbursement in the public assistance programs inasmuch as these systems do not show actual expenditures.

When a county makes a change from one basis to another in the reporting of its expenditures, there shall be no duplication in the claims for matching any item of expense. (FSS-ADMIN.)

646-80 FORMS USED IN ADMINISTRATIVE EXPENSE CLAIMS
AS, ANB, ANC

646-80

Claims for administrative expense shall be submitted immediately after close of each month. A separate claim shall be submitted for each calendar month. (See Secs. 601-00, Quarterly Estimates of Expenditures for Aid and Administration; 601-10, Quarterly Adjustment of Funds; 628-10, State Audit or Aid Claims; and 628-20, Aid Claim Correction.) (W&IC 1560, 2140, 3075; FSS-ADMIN.)

Monthly administrative expense claims consist of the following affidavits and worksheets:

AFFIDAVITS

Administrative Expense Affidavit (Forms Ag 807, Ag 807A, Ag 807B, Bl 807, BHA-80, BHC-80, and CA807) on which county or agency officers attest to the amount of participation due for administrative expenses, shall be submitted in duplicate. (SEE EXAMPLE IN SEC. 646-99, ADMINISTRATIVE EXPENSE FORMS).

AGED

Form Ag 807 used when a county claims reimbursement for OAS and Aged Boarding Home Administration.

Item 1 is the total amount paid by county for administration of both OAS and Aged Boarding Home.

Item 1a is the total amount paid by county for administration of OAS only.

Item 1b is the total amount paid by county for administration of Aged Boarding Home only.

Item 2 is the total amount claimed for reimbursement of expenditures from Federal funds, covering both OAS and Aged Boarding Home.

(Section Continued on Next Page)

645-81 (Continued)

645-81

Extraneous Activities (Ex.). Time shall be charged to this activity when it is spent on a category which is not a welfare program or which does not come under the jurisdiction of the county welfare department. If an employee regularly devotes a portion of his time to welfare duties and a portion to extraneous activity, such as work in the county auditor's or treasurer's office, and his salary is paid from the various budgets according to an arbitrarily fixed ratio, the maintenance of a time record by such an employee serves as a test of the ratio used and assists the county in appraising the method of apportionment. (See Sec. 645-20, EXPENDITURES FOR PERSONAL SERVICES.)

Other Combinations (O.C.). Time shall be charged to this category by employees who work on a special combination of programs when the component programs are integrated in the work of the employee to the extent that it is not possible for him to segregate his time among individual programs. The employee charges his time under this caption, specifying the programs involved, such as Ag, Bl-el; Ag, CA-inel; Ag, CR, CA-el, etc.

A more detailed breakdown of any or all welfare programs may be made by a county if administratively desirable, but the foregoing segregation is the minimum necessary for proper claiming of Federal participation.

Travel Time (Tr.). Time charged here includes all time spent en-route to or from a destination in furtherance of official duties and does not include time spent at destination.

Other Non-Allocable Time (NA). This category includes such time as cannot be identified with any activity or program, such as time in attendance at a conference of a general nature where the employee does not actively participate on behalf of any particular program.

Vacation. Time shall be charged to this item during period of vacation granted in accordance with merit system rules and regulations as set forth in Chapter 070-00, Welfare Personnel Standards.

Sick Leave. Time shall be charged to this item during periods of sick leave granted in accordance with merit system rules and regulations as set forth in Chapter 070-00.

Other Time Off. Time shall be charged to this item when absence of employee is not chargeable to Vacation or Sick Leave and is due to holidays or other leave with pay granted in accordance with merit system rules and regulations as set forth in Chapter 070-00. (W&IC 1560, 2140, 3075; FSS-ADMIN.)

646-80 (Continued)

646-80

BOARDING HOMES FOR AGED

Form BHA 80 used to record the total expenditures made by county for Aged Boarding Home Administration (Column 5 Form DFA 64A) and also to record the number of valid licenses during the month (same as Total on Form BHA 81) to secure reimbursement for inspection and licensing services rendered under Sec. 2302 of the W&IC.

Form BHA 81, Detail of Claim to accompany Affidavit (BHA 80). Submit two copies. Provides columns for (1) Case Number and (2) Name of Licensee. Used by county or agency seeking reimbursement for Inspection and Licensing Services rendered under Sec. 2302 of the W&IC.

BOARDING HOMES FOR CHILDREN

Form BHC 80 used to record the total expenditures made by county for Children's Boarding Home Administration (Column 10, Form DFA 64A) and to record the number of valid licenses during the month (same as Total on BHC 81) to secure reimbursement for inspection and licensing services rendered under Sec. 1622 of the W&IC.

Form BHC 81, Detail of Claim to accompany Affidavit (BHC 80). Submit two copies. Provides columns for (1) Case Number and (2) Name of Licensee. Used by county or agency seeking reimbursement for Inspection and Licensing Services rendered under Sec. 1622 of the W&IC.

CIVILIAN WAR ASSISTANCE

Form WS-3 used when a county claims reimbursement for funds expended in the local administration of War Services programs.

ADOPTIONS

Form AD 807 used when a county claims reimbursement for expenses incurred in administering the adoption program.

WORKSHEETS

Form DFA 64, Administrative Expense Worksheet - Salaries and Wages, shall be submitted in triplicate. This form shows allocation of expenditures based on Monthly Time Record (Form DFA 43), for salaries and wages paid full and/or part time employees. (SEE FORM DFA64 IN SEC. 646-99, ADMINISTRATIVE EXPENSE FORMS.)

Name and Classification Title of each Employee: List the name as it appears on county pay roll records and the abbreviated classification title of each employee. Abbreviations used shall be those shown in Glossary - Merit System Classification Abbreviations.

(Section Continued on Next Page)

646-80 (Continued)

646-80

Form Ag 807A used when a county claims reimbursement for OAS and not Aged Boarding Home Administration.

Item 1 is the total amount paid for administration of OAS.

Item 2 is the total amount claimed from Federal funds for administration of OAS program.

Form Ag 807B used when an agency claims reimbursement for Aged Boarding Homes administrative expense only.

Item 1 is the total amount paid by county for Aged Boarding Home Administration.

Item 2 is the total amount due from Federal funds for Administration of Aged Boarding Home.

BLIND

Form Bl 807

Item 1 is the total administrative expense incurred for all blind persons under ANB law for the month.

Item 2 is the total administrative expense incurred for ineligible cases.

Item 3 is the total administrative expense incurred for all blind cases eligible to Federal aid.

Item 4 is the total amount due from Federal funds for administrative expenses.

CHILDREN

Form CA 807

Item 1 is the total administrative expense incurred for all children's cases under the ANC law for the month.

Item 2 is the total administrative expense incurred for ineligible cases.

Item 3 is the total administrative expense incurred for all children's cases eligible to Federal aid.

Item 4 is the total amount due from Federal funds for administrative expenses.

(Section Continued on Next Page)

646-80 (Continued)

646-80

Column 9, Aid to Needy Children, Ineligible, enter administrative expense for boarding home or institution cases and children claimed ineligible on Aid Affidavit (Form CA 800).

Column 10, Aid to Needy Children, Boarding Home Administration, enter administrative expense identifiable with Boarding Home Administration Inspection and Licensing Services.

Form DFA 64B, Summary of County Employees Paid Less than Full Time Monthly Salary, shall be submitted in triplicate. This form provides for listing all persons employed for less than one full month and shows the dates employed, the total number of days paid, the regular rate for one full month's employment and the amount of warrant issued. When no employees listed on Form DFA 64 were paid for less than one full month, it is not necessary to submit Form DFA 64B. (SEE SEC. 645-50, COMPUTING LESS THAN FULL MONTHLY SALARY.) (SEE FORM DFA 64B IN SEC. 646-99, ADMINISTRATIVE EXPENSE FORMS.) (W&IC 1560, 2140, 3075; FSS-ADMIN.)

646-80 (Continued)

646-80

Month Covered: Show the month for which each expenditure is applicable.

Column 1, Gross Total Expenditures, and Column 3, Total Allocable Expenditures, list actual compensation received as salary or wage. Do not include monies received for travel or other expenses. (W&IC 1560, 2140, 3075; FSS-ADMIN.)

Column 5, Aged Boarding Home Administration: Enter administrative expenses identifiable with Aged Boarding Home Administration Inspection and Licensing Services.

Column 9, Aid to Needy Children, Ineligible, enter administrative expense for Boarding Homes or Institution cases and children claimed ineligible on Aid Affidavit (Form CA 800).

Column 10, Aid to Needy Children, Boarding Home Administration: Enter administrative expenses identifiable with Children's Boarding Home Administration Inspection and Licensing Services.

Form DFA 64A, Administrative Expense Worksheets - Maintenance and Operation and Capital Outlay, shall be submitted in triplicate. This form shows allocation of such expenditures based on results of time recording. (SEE FORM DFA 64A IN SEC. 646-99)

Object of Expenditures shall contain a breakdown of all expenditures listed in county welfare department ledgers and budgets. The individual headings shall be used when further itemized accounts are kept by the county welfare department.

Column 1, Gross Total Expenditures, enter total cost of all items, including taxes, in this column.

Column 2, Less Extraneous Expenditures, enter amount of taxes, other than state sales tax, or expenditures for use of other than the county welfare department, in this column.

Column 3, Total Allocable Expenditures, enter net cost of items. This will be the remainder of gross cost (Column 1) less extraneous expenditures (Column 2).

Column 5, Aged Boarding Home Administration: Enter administrative expenses identifiable with Aged Boarding Home Administration Inspection and Licensing Services.

(Section Continued on Next Page)

Certified as a Regulation (or as
Regulations) of the

Dept of Soc. Welfare
(Name of State Agency)

M. J. Buckley
(Signature)

Director
(Title)

10/15/47
(Date)

MAIN OFFICE
SACRAMENTO
616 K STREET

LOS ANGELES OFFICE
WASHINGTON BUILDING
311 SOUTH SPRING STREET

SAN FRANCISCO OFFICE
DAVID HEWES BUILDING
995 MARKET STREET

EARL WARREN
GOVERNOR

STATE OF CALIFORNIA

DEPARTMENT OF SOCIAL WELFARE

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento
October 14, 1947

~~ENDORSED~~
FILED

in the office of the Secretary of State
of the State of California

OCT 17 1947

At 8.40 o'clock A. M.

FRANK M. JORDAN, Secretary of State

By *Robert M. Jordan*
Assistant Secretary of State

162

BOARDING HOME MANUAL LETTER NO. 8

The attached material is to be entered in your copy of the Manual of Boarding Homes for Aged and Children. These sections were approved by the Social Welfare Board on September 26, 1947.

The Table of Contents is being reissued and includes the index of material in Chapter XIII, Homes in Exclusive Use by Private Child Placing Agencies. Chapter XVI of the Appendix contains the Standards for Child Placing Agencies in California as revised. This material was formerly Part VII H of the Appendix and should now be taken out of the Manual as VII H.

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XIII-140 HOMES IN EXCLUSIVE USE BY PRIVATE CHILD PLACING AGENCIES

XIII-140 NOTIFICATION TO ACCREDITED (PUBLIC) AGENCY

XIII-140

Clearance of pending applications with the Social Service Exchange is desirable to reveal previous social agency registrations of significance in evaluating the home for possible future use. Also, it is desirable to clear pending applications with the accredited (public) agency to reveal possible simultaneous application and study of the home.

The private child placing agency shall notify the accredited (public) agency of the county in which the home is located of each home approved for exclusive use, each home rejected after study, and each home of which exclusive use is being terminated. (See Roster of Accredited and Inspection Agencies, Appendix VIII)

Notification shall be made on Form BHC 30.3 (see form at end of chapter) by the licensed child placing agency within thirty days after action to approve, reject, or terminate the use of the home.

XIII-150 USE OF FORM BHC 30.3 BY ACCREDITED (PUBLIC) AGENCY

XIII-150

The accredited (public) agency shall record and file each such notification in an appropriate manner so that the agency will know at all times which homes are in exclusive use by private agencies and which homes rejected or discontinued require follow-up or licensing. Notification of homes no longer in use, or rejected after study, by the private agency will also be of interest to the accredited agency in case of subsequent application for a license from the accredited agency.

XIII-160 CONFIDENTIAL NATURE OF RECORDS

XIII-160

Sec. VI-800, Confidential Nature of Records, shall be applicable to the interchange of information concerning foster homes between accredited agencies and licensed child placing agencies. A public agency may request of the private agency information in addition to that given on Form BHC 30.3, in order to facilitate its evaluation of the home should application for a license be subsequently filed, or should follow-up be necessary in the event child care is being given for which a license is necessary.

XIII-200 STANDARDS OF FOSTER CARE APPLICABLE TO HOMES APPROVED FOR EXCLUSIVE USE

XIII-200

In general, with the exceptions and qualifications noted below, Chapter IV, Standards for Boarding Homes for children and Application of Standards, shall be the basis for the approval of homes for exclusive use.

A. Purpose of Standards (See Sec. IV-50)

Copies of the Digest of Welfare and Institutions Code and Standards for Foster Home Care of Children (see Appendix VII B of Boarding Home Manual) will be furnished by the SDSW free of charge to licensed child placing agencies upon request. This digest is, however, written primarily for the homes licensed by public agencies and, therefore, is not completely applicable to foster homes approved for exclusive use. The licensed child placing agency is not, therefore, required to furnish copies of the digest to foster homes approved for exclusive use.

(Section Continued on Next Page)

XIII-50 LEGAL BASIS

XIII-50

In order for a private agency to find homes for children under sixteen years' of age and to place children for either temporary or permanent care, or for adoption, a license from the SDSW is necessary. Unless the license issued by the SDSW to the agency provides otherwise, a home selected by the licensed agency for its exclusive use does not require a license during the period the home is used exclusively by the agency. (See Sec. I-800, When License is Not Required)

The work of the agency in selecting homes for exclusive use and in placing children in such homes is subject to review by the SDSW which may terminate its approval of the agency's selection and exclusive use of homes exempt from license.

XIII-100 EXEMPTION FROM LICENSE OF HOMES IN EXCLUSIVE USE LIMITED TO FOSTER FAMILY HOMES XIII-100

The exemption from license of homes in exclusive use shall be limited to boarding homes as defined in Secs. I-430, Family Boarding Homes for Children, I-440, Foster Family Day Care Homes, and I-450, Parent-Child Boarding Homes.

XIII-110 EXEMPTION FROM LICENSE LIMITED TO HOMES WITHIN JURISDICTION OF SDSW XIII-110

The exemption from license of homes in exclusive use shall be limited to boarding homes over which the SDSW has jurisdiction. See Sec. I-700, Homes for Children Under Jurisdiction of the State Department of Public Health, and Sec. I-750, Homes for Children Under Jurisdiction of the State Department of Mental Hygiene.

XIII-130 IDENTIFICATION OF HOMES IN EXCLUSIVE USE XIII-130

Each foster home in the exclusive use of the licensed child placing agency shall be provided with a Certificate of Approval (Form BHC 30.2, Revised), properly completed and signed by the executive or other representative of the agency. (See Form BHC 30.2 at end of Chapter XIII). The agency may print its own form provided that the substitute form incorporates the information appearing on Form BHC 30.2, Revised. A copy of the Certificate of Approval shall be kept in each foster family case record.

XIII-200 (Continued)

XIII-200

F. Health and Medical Care (See Sec. IV-700)

The securing of consent for medical care from parents shall be the responsibility of the child placing agency rather than the foster parent.

G. Register (See Sec. IV-900)

The maintenance of the information required in Section 1627 of the W & I Code shall be the responsibility of the child placing agency.

H. Change of Address or Management (See Sec. IV-930)

A change in the address of the foster home nullifies approval of the home for exclusive use, and another social study at the new address shall be made before approval is again given by the child placing agency. Similarly, approval of a home at a given address is not transferable to a new occupant of those premises.

XIII-250 FOSTER HOME STUDY AND CASE RECORD

XIII-250

All members of the potential foster family shall be seen, and as many office interviews and home visits shall be made as are found to be necessary to adequately determine whether the home can be used and what type of child might be given care in the home.

The foster home study shall be fully recorded and a separate case record shall be maintained for each foster home studied which shall include a face sheet or application form, all pertinent correspondence, medical clearances, necessary annual fire clearances, reference and Social Service Exchange clearances, copy of notice to public licensed agency of action taken, copy of certificate of approval, and a record of each child placed in the home and the dates the child received care.

Reference may be made to Sec. VI-500, Topical Outline for Study of Home, as a guide to the type of information to be recorded.

A periodic recorded evaluation of the continuing service rendered by each home shall be made not less often than annually, and preferably at least quarterly. An evaluation shall be made each time a child leaves the home. All changes in the foster family situation, such as family composition, health, employment, and housing shall be recorded.

XIII-300 MASTER FILE

XIII-300

The child placing agency shall maintain a master file of all foster homes studied.

XIII-310 CASE PROCESSING CONTROLS

XIII-310

Such card files and controls as may be necessary shall be maintained in connection with case processing such as:

1. Pending applications

(Section Continued on Next Page)

B. Compliance with State Laws (See Sec. IV-370 and V-326)

Conformity with state laws and regulations regarding housing, sanitation, and fire safety is required.

The standards for boarding homes do not, however, require conformity to local ordinances. The responsibility of foster parents to comply with any existing local ordinances shall be called to their attention but enforcement of local ordinances rests with local authorities.

C. Fire Safety (See Secs. IV-500, V-310, V-313)

The following types of homes approved for exclusive use shall be referred annually to local fire departments for fire safety clearance (Form BH 23.6, Request for Fire Safety Report, is available for this purpose).

1. Boarding homes for children accommodating more than six children for day care or 24-hour care.
2. Boarding homes for children (day or 24-hour care) located in Federal Housing Projects.
3. Any children's boarding home which appears to present a fire hazard.
4. All temporary structures used in summer only, regardless of the number of children cared for.

Any boarding home for children listed above for which no local fire inspection is available may be approved without clearance. However, if it is believed fire hazards exist, the home shall be referred to the SDSW which will request inspection by the State Fire Marshal.

Homes denied fire safety clearance shall not be approved for use.

D. Number of Children for Which Home May be Licensed (See Sec. IV-609)

The number of children placed in a foster home in exclusive use by the licensed child placing agency will be determined by the individual needs of each child placed, as well as by the physical accommodations of the home and the ability of the foster parents. As in the licensed foster home, the number of children placed in the home at any one time should be such that a home-like setting and individual attention is available to each child in the home.

E. Adherence to Limitations of License (See Sec. IV-650)

The foster home approved for the exclusive use of a licensed child placing agency shall accept only those children placed by the agency which approved the home.

(Section Continued on Next Page)

XIII-400 USE OF LICENSED HOMES AND USE OF HOMES APPROVED FOR EXCLUSIVE USE

XIII-400

A private child placing agency may use a licensed home, and notification of such use shall be made to the public licensing agency.

A home approved for the exclusive use of a licensed child placing agency shall not be used by another agency and shall not accept children for care directly from parents, guardians, or other individuals, unless the home becomes a licensed home.

XIII-450 CHANGE OF STATUS OF BOARDING HOME

XIII-450

A home licensed by a public agency may become a home approved for the exclusive use of the private child placing agency by request of the foster parents and approval of the licensed child placing agency. Immediate notification of the desired change in status shall be made by the private child placing agency to the public licensing agency which shall request the return of the license held by the foster parents. Such a licensed home should be disposed of statistically by the licensing agency as a current license discontinued during the month, and would become statistically a home approved during the month by the licensed child placing agency.

A home approved for exclusive use of a private child placing agency may become a licensed home if either the foster parents or the licensed agency wishes to terminate exclusive use of the home, and provided that the accredited public agency approves the home for license. Immediate notification of the desired change in status shall be made by the private child placing agency to the public licensing agency (See See, XIII-440, Notification to Accredited Public Agency), which shall furnish an application for license and process the application as rapidly as administratively possible. Such a home should be disposed of statistically by the private child placing agency as a home discontinued during the month, and would become statistically a new application received by the accredited public agency.

XIII-500 FORMS AND MATERIALS AVAILABLE FROM THE SDSW

XIII-500

See Form Index, Appendix XIII.

The following forms and materials will be supplied to private agencies, upon request and without charge, by the SDSW, 616 K Street, Sacramento:

- BH 23.6 - Request for Fire Safety Report
- BHC 51 - Medical Consent
- BHC 30.2 - Certificate of Approval of Foster Home
- BHC 30.3 - Notification to Accredited Agency of Action Taken Regarding
Homes Under Section 1622.5, W & I Code
- BHC 41.1 - Statistical Report of Foster Homes Approved for Exclusive Use
by Private Child Placing Agency
- Digest of Welfare and Institutions Code and Standards for Foster Home Care
of Children (See Appendix VII-B)
- Day Care Food Standards (See Appendix VII-C)
- Food for Young Children (See Appendix VII-D)
- Food Pattern for the Adolescent (See Appendix VII-E)
- Instructions for Home Pasteurization of Milk (See Appendix VII-G)

XIII-310 (Continued)

XIII-310

2. Periodic evaluations
3. Annual fire clearances
4. Homes in use
5. Homes studied and available for use

XIII-320 STATISTICAL FILE

XIII-320

An appropriate card file is recommended for the purpose of compiling the necessary monthly statistical report

XIII-330 STATISTICAL REPORT

XIII-330

Agencies licensed by the SDSW to approve homes for their exclusive use shall submit monthly reports to the SDSW on number of homes approved and discontinued.

Form BHC 41.1, Revised, shall be submitted in triplicate to the SDSW, 616 K Street, Sacramento, not later than the eighth day of the month following the month covered by the report. (See form at end of chapter)

XIII-340 INSTRUCTIONS FOR COMPLETING FORM BHC 41.1 (STATISTICAL REPORT)

XIII-340

Item 1. Number of approved homes at beginning of month

Enter the number of homes which were approved for exclusive use as of the beginning of the month. This item must correspond with Item 5, Number of approved homes at end of month, of the previous month's report; if it does not, explain in a footnote.

Item 2. Number of homes approved during the month

Enter here the number of homes which were added during the month. This would include any home whether newly approved or a home reactivated for exclusive use which might have been previously approved for exclusive use.

Item 3. Total number of approved homes during the month

Enter here the sum of Items 1 and 2.

Item 4. Number of homes discontinued during month

Enter here the number of homes for which approval for exclusive use was terminated during the month. This would include homes terminating all care of children, and homes terminating child care exclusively for the agency (For example, a home might be continuing care as a licensed home).

Item 5. Number of approved homes at end of month

Enter the number of homes approved for exclusive use at the end of the month. This item is equal to Item 3 minus Item 4.

(Agency)

An organization licensed by the Department of Social Welfare of California to select homes and place children

Hereby Grants Permission to:

(Foster Parents)

(Address)

To care exclusively for children placed by:

(Agency)

(Address)

This approval may be terminated at the discretion of this agency and does not permit the acceptance of children for care from any other agency, or the acceptance of children for care directly from parents or guardians.

(Date Issued)

Signature

Title

NOTIFICATION TO ACCREDITED AGENCY OF ACTION TAKEN
REGARDING HOMES UNDER SECTION 1622.5, W & I CODETo _____
(Name of Accredited Agency)

Date _____

(Address)

The following action has been taken with respect to:

(Full Name of Foster Parents)_____
(Street Address) (City)_____
(County)Approved for exclusive use _____
(Date)Rejected for use after study _____
(Date)Reason _____
_____Discontinued in use _____
(Date)Reason _____

Need for follow-up because of:

Children in home for whose care license is necessary _____

Intention of foster home to engage in child care in future _____

Possible resource as licensed home _____

Remarks _____

(Name of Child Placing Agency)_____
(Address)

STATISTICAL REPORT OF FOSTER HOMES APPROVED FOR
EXCLUSIVE USE BY PRIVATE CHILD PLACING AGENCY

Agency _____ Report for Month of _____ 19 _____

1. Number of approved homes at beginning of month _____
2. Number of homes approved during month _____
3. Total number of approved homes during month _____
4. Number of homes discontinued during month _____
5. Number of approved homes at end of month _____

Signature of person preparing report _____ Date _____

This report is due in triplicate at the State Department of Social Welfare, 616 K Street, Sacramento, not later than the 8th day of the month following the month covered by the report.

MAIN OFFICE
SACRAMENTO
616 K STREET
(14)

LOS ANGELES OFFICE
WASHINGTON BUILDING
311 SOUTH SPRING STREET
(13)

SAN FRANCISCO OFFICE
DAVID HEWES BUILDING
995 MARKET STREET
(3)

Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES M. WOLLENBERG

DIRECTOR

Sacramento 14
October 27, 1947

SOCIAL WELFARE BOARD

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BERKELEY

RECEIVED
SACRAMENTO, CALIF.

FRANK M. JORDAN
SECRETARY OF STATE
STATE OF CALIFORNIA

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

IN REPLY PLEASE REFER
TO:

My dear Mr. Jordan:

Attached are three copies of the following regulations
issued by the State Department of Social Welfare.

ADOPTION MANUAL LETTER NO. 6

These regulations were adopted by the Social Welfare
Board pursuant to the powers conferred upon it under
Sec. 103 of the W. & I. Code and are filed under Section
11381 of the Government Code.

The regulations attached were adopted to be effective
immediately upon filing with the Secretary of State since
this has been found necessary for the immediate preservation
of the public peace, health and safety or general welfare,
and that notice and public procedure thereon are impracticable
unnecessary or contrary to the public interest.

FILED

in the office of the Secretary of State
of the State of California

OCT 28 1947

At 1:29 o'clock P. M.

FRANK M. JORDAN, Secretary of State

By

Robert V. Jordan
Assistant Secretary of State

Very sincerely yours,

Charles M. Wollenberg
CHARLES M. WOLLENBERG, Director
Department of Social Welfare

206:b5
Attachments

Certified as a Regulation (or
Regulations) of the

Dept of Soc. Welf
(Name of State Agency)

C. A. Schuchman
(Signature)

Director
(Title)

10/27/47
(Date)

MAIN OFFICE
SACRAMENTO
616 K STREET

LOS ANGELES OFFICE
WASHINGTON BUILDING
311 SOUTH SPRING STREET

SAN FRANCISCO OFFICE
DAVID HEWES BUILDING
995 MARKET STREET

EARL WARREN
GOVERNOR

STATE OF CALIFORNIA

DEPARTMENT OF SOCIAL WELFARE

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento
October 23, 1947

126

ADOPTION MANUAL LETTER NO. 6

A copy of the complete Adoption Manual as revised is attached and is to replace the Adoption Manual you have had. All copies of the Adoption Manual previously issued are to be returned to the State Department of Social Welfare, 616 K Street, Sacramento, as they are now obsolete. Revisions to the Adoption Manual you are now receiving will be issued from time to time in the usual manner.

FILED

in the office of the Secretary of State
at the State Capitol Building

OCT 28 1947

At 1:25 o'clock P. M.

FRANK M. JORDAN, Secretary of State

By

Robert V. Jordan
Assistant Secretary of State

MAIN OFFICE
SACRAMENTO
616 K STREET

LOS ANGELES OFFICE
WASHINGTON BUILDING
311 SOUTH SPRING STREET

SAN FRANCISCO OFFICE
DAVID HEWES BUILDING
995 MARKET STREET

EARL WARREN
GOVERNOR

STATE OF CALIFORNIA

DEPARTMENT OF SOCIAL WELFARE

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento
October 23, 1947

FRANK M. JORDAN
SECRETARY OF STATE
STATE OF CALIFORNIA

1947 OCT 28 PM 1 19

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SACRAMENTO, CALIF.

124

ADOPTION MANUAL LETTER NO. 6

A copy of the complete Adoption Manual as revised is attached and is to replace the Adoption Manual you have had. All copies of the Adoption Manual previously issued are to be returned to the State Department of Social Welfare, 616 K Street, Sacramento, as they are now obsolete. Revisions to the Adoption Manual you are now receiving will be issued from time to time in the usual manner.

ENDORSED
FILED

in the office of the Secretary of State
of the State of California

OCT 28 1947

At 1:25 o'clock P M.

FRANK M. JORDAN, Secretary of State

By ROBERT V. JORDAN
Assistant Secretary of State

ADOPTIONS

METHOD OF PLACING REVISIONS AND NEW MATERIAL IN THE MANUAL

In order to provide for the insertion of revised or new material in the manual two notations are used as follows:

1. "Issued" and the date of issuance. This is used when the material is presented for the first time. When a page is noted as "Issued" it should be placed in the manual in its proper numerical order.
2. "Revised" and the date of revision. This is used when the page or part of the material appearing on the page already issued is being revised. A vertical line in the margin of the corrected page is placed opposite the line or lines which have been revised. When a section or a part of a section is noted as "Revised" the corresponding page or pages in the manual should be removed and the revised page or pages inserted in their place.
3. "Reissued" and the date. This is used when a complete chapter or the entire manual is being reissued. Material reissued will not have the changes indicated with lines as the notation "Reissued" is an indication that the entire chapter has been rewritten.

NUMBERING OF REVISIONS. Each revision will be numbered in sequence as released. It is important that the holder of this manual check off the corresponding numbered revisions, as received, on the revision record below. The State Department of Social Welfare should be notified in the event a revision number is passed without receipt of the corresponding numbered sheet.

REVISION RECORD

1	16	31	46	61	76	91
2	17	32	47	62	77	92
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COPY NO.

124

MANUAL
OF
ADOPTION
POLICIES
AND
PROCEDURES

State of California
Department of Social Welfare
Sacramento

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ADOPTION IN CALIFORNIA

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2010-00 (Continued)

2010-00

The second change was the elimination of the 90-day limit allowed for the adoption investigation. Under the law of 1927, if within a 90-day period the report on the investigation was not completed, the adoption could be consummated without a report from the Department of Social Welfare.

The third change was the elimination of the requirement that the Department make an investigation and report on stepparent adoptions where one natural parent retained custody of the child.

In 1933 a provision was added to the adoption law requiring the probation officer in the county in which the petition for adoption by a stepparent was pending to make an investigation and report to the court on the proposed action.

In 1935 a limitation on the time allowed for the investigations by the State Department of Social Welfare was again inserted in the law. A period of 180 days was allowed and a provision was added that if the Department failed to submit its report within that time the court could allow a consent to be signed in open court. The court, however, was given authority to allow such additional time for the filing of the report as seemed necessary.

In 1947 the law was amended to permit the State Department of Social Welfare to license county adoption agencies to accept relinquishments of children from parents and to place children for adoption, and to investigate independent adoptions. Provision was also made that adoption hearings must be held in private; and that any report filed by the State Department of Social Welfare or county adoption agency recommending denial because the home of the petitioners was not suitable should be immediately referred by the county clerk to the superior court for review.

2020-00 GENERAL LEGAL PROVISIONS REGARDING ADOPTIONS

2020-00

The legal sanction for adoptions in California and the procedural framework by which the new relationship is established are found in the Civil Code of California, Sections 221 to 231 inclusive.

Child May Be Adopted

Any minor child may be adopted by any adult person, in the cases and subject to the rules prescribed in this chapter. (Sec. 221, Civil Code)

Who May Adopt

The person adopting the child must be at least 10 years older than the person adopted. (Sec. 222, Civil Code)

A married man, not lawfully separated from his wife, can not adopt a child without the consent of his wife, nor can a married woman, not thus separated from her husband, without his consent, provided the husband or wife, not consenting, is capable of giving such consent. (Sec. 223, Civil Code)

2010-00 HISTORICAL DEVELOPMENT

2010-00

California passed its first adoption statute in 1870, twenty years after admission into the Union. In 1872, this act was superseded by the adoption law of the Civil Code which has remained in substantially the same form to the present time. It provided that any minor child could be adopted by an adult, at least 15 years (now 10 years) older than the child but that the person adopting must have been married, and, if a woman, be a widow or lawfully divorced from her husband without her fault. A married man not lawfully separated from his wife could not adopt a child without his wife's consent.

Legislation in the years following 1872 refined the early law in keeping with the trend of other legislative enactments designed to protect children. The most outstanding change in the adoption law since 1872 was that made by the legislation of 1927 which gave the Department of Social Welfare certain responsibilities in regard to adoptions. Previous to this time petitions for adoption were acted upon by the court with no investigation of the circumstances of the child, his natural parents, or the adopting parents, and no safeguards had been provided to protect those concerned from hasty and unsuitable adoptions.

Under the amendments of 1927 the Department of Social Welfare was given the duty of investigating and reporting to the court on all petitions for adoption. According to the statutes of 1927, following a petition to the Superior Court of the county in which the petitioner had residence it was the duty of the clerk of the court immediately to notify the Department of Social Welfare in writing of the pendency of the action. It was made the duty of the Department of Social Welfare to make an investigation in all cases of adoption in which no agency licensed to place children for adoption was a party and to make a full report to the court of the facts with a recommendation regarding the granting of the petition. Consent could be signed in the presence of the county clerk. No hearing could be held until 90 days after filing the petition unless within that time the Department had submitted a report.

Three important changes were made in the adoption law by the 1931 Legislature. The first was the provision that in all cases in which consent was required, except when the adoption was by stepparent and unless a society licensed to place children for adoption joined in the petition, the consent must be signed in the presence of an agent of the Department of Social Welfare and accepted after an investigation to establish that the child was a proper subject for adoption and the home of the petitioners was a suitable one for the child. The Department had found that under the previous law "when consent was filed with the petition, the parent gained the impression that his whole responsibility toward the child had been severed by such an act, and if during the investigation it was learned that either the child or the home was not suitable, it was frequently difficult to refer back to the natural parent and to hold him to a legal responsibility....some parents had gained such an impression of finality that the child was frequently left in unfit surroundings with the petitioners leaving no person or agency responsible for the child."¹

1. State of California, Third Biennial Report, Department of Social Welfare July 1, 1930 to June, 1932, p. 52.

(Section Continued on Next Page)

the court. The court may grant additional time for the filing of the report. (Sec. 226, paragraph 5, Civil Code)

E. Service Which May Be Rendered Prior to Filing of Petition

Prior to receipt by the Department of notification of pendency of an adoption petition in a county, the Department and the county adoption agency has no legal obligation to render any service on an adoption matter. In actual practice, however, they can give considerable service to natural parents, prospective adoptive parents, attorneys, physicians and other interested persons. Contacts with such persons are generally limited to office interviews or through correspondence. An opportunity is given in these instances to interpret the adoption program and the principles of child care and placement. A pamphlet summarizing the principal provisions of the Adoption Law is available for distribution. A form for guidance in preparing petitions for adoption may be given upon request to petitioners or their attorney.

2050-00 AGENCY ADOPTIONS - THROUGH RELINQUISHMENT

2050-00

A. Legal Basis

The general provisions of the Adoption Law apply to agency adoptions. Specific provisions applying only to agency adoptions appear in Sections 224m, 225m, and 226, paragraph 5 of Civil Code.

B. Responsibility of Agency

1. To accept relinquishments of children for adoption.
2. To find homes for children relinquished for adoption.
3. To place children in approved homes for adoption.
4. To join with the adopting parents in the petition for adoption.

C. Responsibility of SDSW in Agency Adoptions

1. To license and supervise administration of adoption agencies.
2. To accept relinquishments for filing.
3. To file a report to the court or to issue a waiver of further report.

For detailed information see Chapter on Agency Adoptions - Relinquishments.

2030-00 TYPES OF ADOPTION

2030-00

Provision is made in the law for four types of adoption: (1) independent, in which the child is placed by the parent, who consents to the adoption by the specific individuals; (2) agency, in which the child is relinquished by the parents to a licensed adoption agency and is placed by the agency; (3) stepparent, in which a stepparent adopts and one natural or adoptive parent retains custody and control of the child; and (4) adoption of an illegitimate child by the natural father.

2040-00 INDEPENDENT ADOPTIONS

2040-00

A. Legal Basis

Section 226 of the Civil Code sets forth the basic statutory framework under which the State Department of Social Welfare and county adoption agencies are given responsibility for the investigation of "independent" adoptions.

B. Specific Responsibilities of State Department of Social Welfare and County Adoption Agency

- 1 To ascertain whether the child is a proper subject for adoption.
- 2 To ascertain whether the proposed home is suitable for the child.
- 3 To submit to the court a full report of the facts disclosed by its inquiry, with a recommendation regarding the granting of the petition. (Sec. 226, paragraph 4, Civil Code)
- 4 To submit to the attorney for the petitioner in the proceedings, if the petitioner has an attorney, or to the petitioner, a copy of any report or findings submitted to the court. (Sec. 226, paragraph 6, Civil Code)
- 5 To witness the signature to the consent to adoption by the natural parent or parents residing in California on a form prescribed by the Department. (Sec. 226, paragraph 1, Civil Code)
- 6 To give its consent in all cases in which the consent of the natural parent or parents is not necessary, if it finds that the child's welfare will be promoted by the adoption.

C. Specific Responsibility of State Department of Social Welfare

To give its consent in all cases in which the consent of the father or mother of the child has been signed outside the State of California before a notary public.

D. Time Limit for Investigation

The investigating agency is allowed 180 days from the date of the filing of the petition within which to make its investigation and report to

(Section Continued on Next Page)

wife, if he is married, (4) into his family, and (5) otherwise treating it as if it were a legitimate child, thereby adopts it as such; and such child is thereupon deemed for all purposes legitimate from the time of its birth, the foregoing provisions of this chapter do not apply to such an adoption. (Sec. 230, Civil Code)

B. Responsibility of State Department of Social Welfare

The State Department of Social Welfare has no responsibility for investigation or report concerning this type of adoption.

C. Problems Under Section 230, Civil Code

1. The status of the child is uncertain, as it may be difficult to prove that a father has complied with each of the five provisions of the section and has thereby adopted the child.
2. If the natural mother of the child is living, she retains all her rights to the custody and control and earnings of the child, and, if the natural parents are not living together and jointly rearing the child, this may cause difficulties.
3. Since there is no court record or other record concerning such adoptions, there are no statistics concerning the number of children who have been so adopted.

D. Alternate Plan to Use of Sec. 230, Civil Code

For the reasons noted, the father in many instances may prefer to file a petition for the adoption of his illegitimate child under Sec. 226, Civil Code, and follow the procedure provided in Sec. 227, Civil Code. In such cases all the provisions of the Civil Code relating to adoptions are complied with. The natural mother must give her consent to the adoption by the natural father.

E. Relation of Sec. 230, Civil Code, to Other Adoptions

When an illegitimate child is placed for adoption, it is important to determine whether the father of the child may have previously adopted the child under Sec. 230, Civil Code, in which case it is necessary to secure the father's consent to the adoption.

2060-00 STEPPARENT ADOPTIONS

2060-00

A. Legal Basis

The general provisions of the Adoption Law apply to stepparent adoptions. The following code sections apply specifically to stepparent adoptions:

1. In case of an adoption of a child by a stepparent where one natural or adoptive parent retains his or her custody and control of said child, the consent of either or both parents must be signed in the presence of a county clerk or probation officer of any county of this state on a form prescribed by the SDSW and the county clerk or probation officer before whom such consent is signed shall immediately file said consent with the clerk of the Superior Court of the county where the petition is filed and said clerk shall immediately file a certified copy of such consent to adoption with the SDSW. (Sec. 226, paragraph 7, Civil Code)
2. The probation officer in the county in which the action for adoption is pending shall make an investigation of each case of adoption by a stepparent. No order of adoption shall be made by the court until after such probation officer shall have filed his report and recommendation and the same shall have been considered by the court. (Sec. 227a, Civil Code)

B. Responsibility of State Department of Social Welfare in Stepparent Adoptions

1. The consent of the Department is not necessary where the consent of one of the parents is executed outside the state. (Sec. 226, paragraph 8, Civil Code)
2. When inquiries are received by the SDSW or adoption agency concerning stepparent adoptions, explanation should be given that the petition must be filed in the county of residence of the petitioners and that the probation officer of that county is charged with the responsibility of investigation and report to the court. The inquirer should be referred to the probation officer for further information.

"A Manual for Stepparent Adoption" prepared and issued by the Probation and Parole Association of California, gives instructions to Probation Officers regarding procedures to be followed by them.

2070-00 ADOPTION BY FATHER OF ILLEGITIMATE CHILDREN

2070-00

A. Legal Basis

1. The father of an illegitimate child, by (1) publicly acknowledging it as his own, (2) receiving it as such, (3) with the consent of his

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COURT PROCEEDINGS

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2100-00

- (b) Birth date and birthplace of child.
- (c) Legal status of the child, which may be stated in the following way:
- (1) The child was born unto _____ and _____, husband and wife, or
 - (2) The child was born out of wedlock unto _____, or
 - (3) The child was born unto _____, and pursuant to Secs. 200 and 224 of Civil Code of California, the consent of the mother only is required to the adoption.
- (d) When the child has been relinquished to an agency, it is the agency's responsibility to furnish the attorney information regarding the child to be included in the petition.

3. Child's Name After Adoption

A child, when adopted, may take the family name of the person adopting. (Sec. 228, Civil Code) It is, therefore, desirable to include in the petition the name by which the child will be known after adoption, regardless of whether the name is changed or remains the same.

4. Amended Petition

- (a) An amended petition may be filed to correct errors in the original petition, or
- (b) To present new facts or facts which have been disclosed after the filing of the petition, for example:
- (1) Amended petition showing that the child has been declared free from the custody of his parent or parents.
 - (2) Amended petition showing that the parent, whose consent was otherwise necessary, has died.
 - (3) Amended petition showing that the natural mother, who had been reported to have sole custody, was in fact married at the time of the child's birth, and giving the correct date obtained.

2100-00 PROCEDURE FOR FILING PETITION

2100-00

A. Filing

Any person desiring to adopt a child may for that purpose petition the Superior Court of the county in which the petitioner resides and the clerk of the court shall immediately notify the State Department of Social Welfare at Sacramento in writing of the pendency of the action and of any subsequent action taken. (Sec. 226, Civil Code)

B. Form of Petition

There is no required form for a petition and it may be prepared by either the attorney for the petitioner, or by the petitioner acting as his own attorney. The Department will make available on request to the petitioners or their attorney an outline which may be used in the preparation of an adoption petition.

C. Content of Petition

In order to insure that basic legal requirements are met, it is desirable to include in the petition the following points regarding the petitioners, the child to be adopted, the child's name after adoption:

1. Petitioners

- (a) That petitioners are residents of the county in which the petition is filed. (Sec. 226, Civil Code)
- (b) That petitioners are adults (i.e., over 21 years of age), and at least 10 years older than the person adopted. (Secs. 221, 222, Civil Code)
- (c) Petitioners' marital status. This is necessary because of the provision that a married man not lawfully separated from his wife can not adopt a child without the consent of his wife, nor can a married woman not thus separated from her husband, without his consent, provided the husband or wife not consenting is capable of giving such consent. (Sec. 223, Civil Code)
- (d) The address of the petitioners is not required by law, but it is desirable to include it in the petition (since the petitioners will be interviewed during the course of the investigation).

2. Child to be Adopted

- (a) Name of the child, including all variations if a child has been known by several names. If the name on the birth certificate is different from that by which the child is known to the petitioners this should be clearly stated.

(Section Continued on Next Page)

2110-00 TYPES OF COURT REPORTS - INDEPENDENT ADOPTIONS

2110-00

(For complete report, see Sec. 2105-00).

A. A recommendation of approval shall be made when it is determined that the child is a proper subject for adoption and that the home is suitable for the child.

B. A recommendation of denial shall be made in every case in which the investigation during the 180-day period or extension of time fails to establish that the child is a proper subject for adoption or that the proposed home is suitable for the child. This shall include the following situations in which the child is too young for adequate testing:

1. When nothing is known of one natural parent, and the investigation establishes that the other natural parent is of low intelligence;
2. When it is not possible to obtain adequate information on either of the natural parents. This would always apply in the case of a foundling or an abandoned child and in those cases in which the attorney may be using the abandonment procedure to avoid having the parents interviewed.

In both instances, final determination that the child is a proper subject for adoption shall be made only after complete physical and psychometric testing.

Because of the feeling of some petitioners and attorneys against denials, a recommendation of denial without prejudice to the petitioners may be made if the investigation has been completed and the adoption appears socially desirable, but there is some obstacle, which cannot be cleared at the time. When the obstacle is finally cleared, a supplementary report recommending approval may be filed.

When there is to be a recommendation of denial, it should be discussed with the attorney in ample time to allow him to file a dismissal before the report is due, if he prefers to do so rather than have an adverse report filed.

C. A conditional recommendation of approval may be made when a legal determination is involved. It shall never be used, however, in order to escape responsibility for a definite decision when the matter is one involving judgment. Conditional recommendations may be made in the following instances:

1. When the child has been awarded to the mother by judicial decree and the father has willfully failed to contribute to its support for the period of one year when able to do so.
 - (a) If the petition alleges that the father's consent will be eliminated by court determination under Sec. 224, Civil Code, as having willfully failed to contribute when able; or
 - (b) If copy of the citation (either for personal service or by publication) is submitted by the attorney.

(Section Continued on Next Page)

The State Department of Social Welfare or county adoption agency is required to submit to the court a full report of the facts disclosed by its inquiry, with a recommendation regarding the granting of the petition. The final report should be a concise summary of all the facts pertinent to the adoption. (Sec. 226, Civil Code)

A. Purpose of the Report

"The purpose of the report to the court is to supply the judge with factual information so interpreted that he may have a clear but unbiased understanding of the entire situation surrounding the proposed adoption to assist him in making his decision." From the report the court may have the benefit of this factual information, in addition to the examination of the parties in court, on which to base a decision as to granting the petition. The report to the court, therefore, is one of the most important parts of the adoption procedure.

B. Content of the Report

1. A statement of the pertinent facts disclosed by the investigation. (See Outline for Court Report and Instructions for Preparing in Appendix)
2. A statement of findings as to the adoptability of the child.
3. A statement of findings as to the suitability of the home for the child.
4. Recommendations as to the granting of the petition.
 - (a) If the recommendation is that the petition be granted, the parents' consents in the possession of the agency must be attached to the report and there must be a statement that the Department or county adoption agency has accepted the parents' consents, or that it consents.
 - (b) If the recommendation is that the petition be denied, the section on consents must show that the consent of the parent was signed in the presence of an agent or notary, as the case may be, on the given date; but no reference will be made to the consent in the recommendation. The recommendation should show only the reasons for denial. In such cases the consent will be attached to the report. If the consent of the Department or county adoption agency is necessary, the recommendation must show the reasons for denial and must state that it refuse to consent.

2110-00 (Continued)

2110-00

E. Appeal report (See Sec. 2150-00)F. Revocation Report (See Sec. 2155-00)2115-00 EXTENSION OF TIME FOR REPORT.

2115-00

A. Legal basis;

Except in the case of the adoption of a child by a stepparent where one natural or adoptive parent retains his or her custody and control, it shall be the duty of the Department of Social Welfare or county adoption agency to submit to the court a full report of the facts disclosed by its inquiry with a recommendation regarding the granting of the petition, within 180 days after the filing of the petition, provided, however, that the court may allow such additional time for the filing of said report as in its discretion it may see fit.

B. When extension may be requested:

An extension of time may be requested when it is evident that the obstacle which makes a recommendation of approval impossible at the time can be cleared within a reasonable period. It is not contemplated that requests for extensions shall be made because of delays which are the result of negligence on the part of the agency. The request should be in the hands of the supervisor at least fifteen days before the due date of the report to allow time for the granting of the request by the court and to insure that no report will be late.

Instances in which extensions may be requested are as follows:

1. When an essential piece of documentary evidence has not been received.
2. When a petition is to be filed to have the child declared free from the custody and control of his parents, if such petition can be filed within the limit of an additional 180 days.
3. When the petitioners wish time to make certain adjustments which are deemed desirable before the adoption can be recommended.
4. When the child's development is slow, or when there is a doubtful hereditary background and the petitioners agree with the agency that a further period of time should be allowed for the study and observation of the development of the child before a final decision is reached.
5. When the petitioners, or their attorney, for some specific reason, have requested the agency not to proceed with the investigation at the time.

(Section Continued on Next Page)

2110-00 (Continued)

2110-00

2. When the child is to be declared free from the custody and control of the parents.
 - (a) If an endorsed copy of the petition to declare him free from the custody and control of his parents is furnished to the Department; or
 - (b) If notice of the filing of such petition is received from the Juvenile Court.
3. When there is a presumptive father, or more than one presumptive father, necessity for whose consent is to be eliminated by court action prior to the adoption hearing, if the facts disclosed by the Department's investigation support the mother's claim that he is not the natural father.
4. When the certificate from the superintendent of a State hospital or the State Director of Institutions qualifies the statement that the parent will not be capable of controlling or supporting the child in a proper manner by such phrases as "I believe" or "in my opinion".
5. There may be other instances where a conditional recommendation of approval may be desirable. It should be made, however, only with the approval of the supervisor.

D. Supplemental Report

1. When a petition has been denied without prejudice, either because a statutory provision has not been met or because a determination could not be made at the time that the child was a proper subject for adoption, a supplementary report recommending that the petition be granted may be filed when the obstacle is cleared. It will not be necessary for a new petition to be filed if the original petition has not been heard. The information in the report must be current. If more than three months have elapsed since the last home visit, another visit must be made before the report is filed.
2. After the submission to the court of the complete report with recommendation, the Department or county adoption agency may be requested by the court to file a supplemental report giving additional information. Such report shall always be filed upon request.
3. The petitioners or their attorney may request the Department or county adoption agency to file a supplemental report in instances where its final report has recommended denial but the petition has never been heard, and in the succeeding years, circumstances have changed. The requested investigation and report may be made, though it may be desirable to request the attorney to file an amended petition, setting forth the new facts, and to submit a copy of the amended petition to the Department.

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2115-00 (Continued)

2115-00

obstacle cannot be cleared within that time, a second request may be filed asking for an additional period, not to exceed ninety days. The total extensions requested should not ordinarily exceed 180 days, or a total investigation period of 365 days. If the obstacle is not cleared by that time, the final report shall be filed, with recommendation of denial without prejudice if that is deemed advisable.

There may be exceptions, including the following:

1. If the woman petitioner is pregnant, it may be necessary to ask for an extension beyond the additional 180 days, pending the birth of the child.
2. If there is a health condition which is in process of being cleared, for example, awaiting a negative serological, further extension may be requested.

If it is necessary to request a longer extension, report of the circumstances shall be sent to the Adoption Bureau.

2120-00 COURT REPORT - AGENCY ADOPTIONS

2120-00

The agency shall file a report to the court on every petition in which it joins. Since the fact that it has made the placement and joined in the petition signifies its approval of the home, the report may be a brief one, containing a statement of the identity of the child, the date of the relinquishment or relinquishments to the agency, brief statements about each petitioner, and a statement that the agency approves and consents to the adoption.

A copy of the court report shall be sent to the SDSW, which, on receipt of the Notification of Pendency, will issue its approval waiver of further investigation.

2125-00 COURT REPORT - STEPPARENT ADOPTIONS

2125-00

The probation officer of the county in which the petition is filed is responsible for making the investigation and report and recommendation to the court. No order of adoption can be made by the court until after the probation officer has filed his report and it has been considered by the court. (Sec. 227a, Civil Code)

2130-00 COPY OF REPORT TO ATTORNEY FOR THE PETITIONERS

2130-00

Whenever any report or findings are submitted to the court, a copy of such report or findings must be submitted to the attorney for the petitioners when they have an attorney, and otherwise to the petitioners. (Sec. 226, Civil Code)

2135-00 COURT HEARING PRIVATE

2135-00

All Superior Court hearings in adoption proceedings shall be held in private, and the court shall exclude all persons except the officers of the court, the parties, their witnesses, counsel, and representatives of the agencies present to perform their official duties under the laws governing adoptions.

2115-00 (Continued)

2115-00

C. Procedure for Securing Extensions

1. Address written request to the court, giving explanation of necessity for such extension of time (Form Adop M19).
2. Submit the request, together with three copies of the form, for authorization of the extensions (Form Adop M34). This should be directed to the county clerk, with one copy to the attorney for the petitioners, and the clerk should be instructed to retain one copy of the authorization for his files.
3. When the authorization is received, file one copy in the adoption case record, and send one copy to the attorney for the petitioners.
4. A copy of the letter to the attorney transmitting signed authorization of extension (Form Letter Adop M39) shall be sent to the Bureau of Adoptions in Sacramento. A copy may also be sent to the petitioners if the agent considers it necessary.

If the order authorizing the extension is not returned from the court within a reasonable length of time, clearance shall be made with the judge. If the authorization has not been returned and no word has been received from the court by the 175th day, or, if the judge has refused to authorize extension, a full report of all information which has been obtained up to that date shall be filed, with recommendation of denial. This must be in the hands of the court within the 180-day period.

D. Content of Request

The request shall include the following:

1. The names of the petitioners, the date on which petition was filed, and the original due date.
2. A statement of the status of the case, giving reason for the request for extension of time. This should be specific and full enough to give the judge a true picture of the obstacle which prevents the completion within the time allowed by law.
3. When the attorney, or the petitioners, or both, concur in the request, a statement should be included to that effect.
4. A statement of the specific number of days needed within which to file the final report.

E. Length of Time to be Requested

The extension requested shall be for the period of time estimated as adequate to clear the obstacle to the filing of the final report. Ordinarily, the extension should not exceed ninety days. If the

(Section Continued on Next Page)

2150-00 APPEAL - INDEPENDENT ADOPTION

2150-00

A. Appeal may be filed in the Superior Court of the county in which the petition is filed. (Sec. 226, paragraph 9, Civil Code)

1. By the natural parent or parents, or

2. By the petitioners.

B. Grounds for appeal are:

1. Failure or refusal of the State Department of Social Welfare or county adoption agency, within 180 days from the date of the filing of the petition, or the expiration of any extension of time granted by the court, to accept the consent of the natural parent or parents; or

2. Failure or refusal of the State Department of Social Welfare or county adoption agency to give its consent to an adoption in those cases where its consent is required.

C. The procedure is as follows:

1. The clerk of the court shall immediately notify the State Department of Social Welfare of such appeal.

2. The State Department of Social Welfare or county adoption agency shall file a report of its findings and the reason for its failure or refusal to consent or to accept the consent of the natural parent. A copy of the report must be sent to the attorney for the petitioners, or if they have no attorney, to the petitioners. If there is no further information to add to the full report already filed, the report can be a statement that there is no new information and that the recommendation of the State Department of Social Welfare or county adoption agency is based on the findings contained in the final report.

3. After the filing of the findings of the State Department of Social Welfare or county adoption agency the court may, if it deems that the welfare of the child will be promoted by the adoption:

(a) Allow the signing of the consent by the natural parent or parents in open court.

(b) If the appeal is from the refusal of the State Department of Social Welfare or county adoption agency to consent, grant the petition without such consent.

2140-00 COURT APPEARANCE

2140-00

- A. The person or persons desiring to adopt a child and the child proposed to be adopted must appear before the court. (Secs. 227 and 227aa, Civil Code)

1. Exception

Provision is made for exception if the adoptive parent is commissioned or enlisted in the military service or auxiliary thereof of the United States, or any of its allies, or in the American Red Cross, and appearance is impossible or impractical. In such cases appearance may be made for such person by his or her counsel, commissioned and empowered in writing to do so. (Sec. 227, Civil Code)

2. Examination by Court

The court must examine all persons appearing before it, each separately. When appearance is made by counsel, the court may, in its discretion, cause such examination of the adoptive parent, other interested party, or witness to be made upon disposition, as it deems necessary. (Sec. 227, Civil Code)

3. Agency Representation

There is no legal requirement that the investigating agency or agency making the placement shall have a representative in court, and it is not customary to be so represented, except upon request of the court, the petitioners, or their attorney.

2145-00 ACTION TO GRANT THE ADOPTION

2145-00

- A. If the court is satisfied that the interests of the child will be promoted by the adoption, the party or parties adopting shall execute or acknowledge an agreement in writing that the child shall be treated in all respects as a lawful child of the party or parties.

In those cases where the adopting parent is permitted to appear by counsel the agreement may be executed and acknowledged by such counsel for such absent parent or may be executed by such absent parent before a notary public or any other person authorized to take acknowledgements, including the persons authorized by Sections 1183 and 1183.5 of the Civil Code. (Sec. 227, Civil Code) The court shall thereupon make an order awarding the custody of the child to the adopting parent or parents. (Sec. 227, Civil Code)

- B. The petition, relinquishment, agreement and order, and any power of attorney and deposition must be filed in the office of the county clerk and shall not be open to inspection by any person other than the parties to the action and their attorneys, and the State Department of Social Welfare, except upon the written authority of the judge of the Superior Court. (Sec. 227, Civil Code)

2155-00 (Continued)

2155-00

- (4) Discuss with the Attorney General the report which the Department is required to file with the court, and anything further he may wish from the Department.
- (5) File a full report with the court within 60 days.
- (6) On receipt of the notice of time and place of hearing, notify the Attorney General (in the proper district office) of the time and place of hearing, and arrange for the appearance of a representative of the Attorney General at the hearing. (AGO NS 755)

C. Action Following Setting Aside of Decree of Adoption (Sec. 227c, Civil Code)

1. The court:

- (a) Shall direct the district attorney or a psychopathic probation officer, or any suitable person, to take proceedings under the respective chapter of the Welfare and Institutions Code relating to commitment of insane or feeble-minded or epileptic persons as the case may be.
- (b) It may also make such order relative to the care, custody, or confinement of the child pending the proceedings as it sees fit.

The county in which the adoption proceedings were had shall be liable for the support of the child until he shall have been declared sane, or restored to capacity, and in any event until he is able to support himself.

2160-00 ACTION TO DETERMINE PARENTAL RELATION

2160-00

An action may be brought for the purpose of having declared the existence or non-existence between the parties of the relation of parent and child by birth or adoption. (Sec. 231, Civil Code)

When the determination of the parental relation is necessary in an adoption case, it must be by separate action from the adoption proceedings. The action can be heard, however, at the time of the adoption hearing by the court transferring its attention from the adoption case to the civil action. The matter can be presented by the attorney as he sees fit. A written petition is not necessary, if the court is satisfied with a verbal presentation.

2165-00 ADOPTION RECORDS

2165-00

The petition, relinquishment, agreement, order, and any power of attorney and deposition must be filed in the office of the county clerk and shall not be open to inspection by any other than the parties to the action and their attorneys and the State Department of Social Welfare except upon the written authority of the judge of the Superior Court. (Sec. 227, Civil Code)

2155-00 ACTION TO SET ASIDE ADOPTION

2155-00

A. A decree of adoption may be set aside by the court (Sec. 227b, Civil Code):

1. If any child adopted under the provisions of the Adoption Law
 - (a) Shows evidence of being feeble-minded, epileptic, or insane;
 - (b) As a result of conditions prior to adoption;
 - (c) Of which conditions the adopting parent or parents had no knowledge or notice prior to entry of the decree for adoption.
2. If such facts are proved to the satisfaction of the court, and
3. If the petition setting forth such facts is filed within five years after entering of the decree of adoption.

B. Procedure

1. The clerk of the Superior Court of the county wherein the action is brought shall immediately notify the State Department of Social Welfare of the action, and shall also notify the Department of the time and place of hearing.
 - (a) Within 60 days after such notice the State Department of Social Welfare shall file a full report with the court and shall appear before the court to represent the child,
 - (b) The Department (Adoption Bureau) will send acknowledgment of the receipt of the notice to the clerk of the Superior Court with a copy to the attorney for the petitioners.
 - (c) The agent to whom the case is assigned shall:
 - (1) Write the Attorney General, attention the deputy in charge, at Sacramento, San Francisco, or Los Angeles depending upon the location of the local office of the Department handling the matter (1) that an action has been brought, (2) the name of the agent assigned to the case, and (3) request that he represent the Department in the action;
 - (2) Make as complete an investigation of the petition as may be necessary to determine the facts in the case;
 - (3) Prepare and forward to the Attorney General (in the proper district office) a statement of the facts pertaining to the adoption, including all the information possessed by the Department as to the knowledge of the adopting parents of the child's condition prior to the entry of the decree of adoption.

(Section Continued on Next Page)

2175-00 (Continued)

2175-00

B. Attorney's Fees

Petitioners are responsible for any attorney's fees incurred by them.

C. Agency Fees - Public Agencies

There are no fees for the services of the SDSW or county adoption agency in investigating an independent adoption, and no fees for the services of the county adoption agency to natural parents or adopting parents in placing a child relinquished to it.

The county adoption agency, however, may require the adopting parents to reimburse it, up to \$200, for the cost of the care of the child from the time of relinquishment until placement for adoption. (Sec. 225p, Civil Code)

D. Agency Fees - Private Agencies

A private agency may charge a fee for service, based upon an actual sharing of costs of service, and clearly defined as such at the time of the application by the prospective adoptive parents. Placement of a child shall not be contingent upon or determined by payment of a fee.

2170-00 CONFIDENTIAL INFORMATION

2170-00

A. Release of Information in Case Records

When any of the following public or private welfare agencies specified in Section 227aaa of the Civil Code: (1) the Juvenile Court, (2) any county welfare department, (3) any public welfare agency, or (4) any private welfare agency licensed by the Department, requests information concerning an adoption petition, either pending at the time or closed, the information may be furnished to it if the agent and supervisor consider that the welfare of the child will be promoted thereby. Pertinent information may be given either verbally or in writing. The narrative shall show what information was given, when, and to whom.

Although the welfare of the child is the determining factor in releasing information, the agency should exercise care in the investigation to protect all parties, particularly the natural parents, in requests which it may make to other agencies, institutions, or individuals for information regarding the proposed adoption.

Care should be exercised in requesting school records, even though the parent may have signed an authorization for release of information. In requesting school records, it is not necessary to state that the mother has had a child or that the request is in connection with an adoption.

B. Use of Information Given Confidentially

When information has been given on written authorization by the parent or petitioners, it may be used in the court report or released to other agencies as provided in Section 227aaa of Civil Code.

When information is obtained from any other agency or any individual other than a reference, without authorization, it should be treated as confidential and should not be included in the court report without the permission of the informant.

2175-00 COSTS IN ADOPTION

2175-00

A. Court Costs

There are no filing fees nor court costs in an adoption action. There may be costs to the petitioners if other court action related to the adoption is necessary as follows:

1. If the child is declared free from custody and control of his natural parents, there may be fees involved for service of citation and cost of publication in the newspaper of citation.
2. If the consent of the father is eliminated under Sec. 224, Civil Code, there may be costs for personally serving him with the copy of the citation of the hearing, or for serving him by publication.
3. If depositions are necessary under Secs. 227 and 227a, Civil Code, there may be fees for taking them.

(Section Continued on Next Page)

CONSENTS AND RELINQUISHMENTS

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2205-00 (Continued)

2205-00

- C. An Adopted Child. In the event that an adopted child again becomes the subject for adoption, the consent of the adoptive parents is necessary to the new adoption but the consent of the child's natural parents is not necessary in such cases.
- D. Consent or Relinquishment by a Parent Who is a Minor.
1. A parent who is a minor shall have the right to sign a consent for the adoption of his or her child, and such consent shall not be subject to revocation upon such parent's reaching his or her majority. (See Sec. 226, paragraph 9, Civil Code)
 2. The consent of the parents of such parent who is a minor is not necessary to the adoption.

2210-00 ACTIONS IN LIEU OF CONSENT OR RELINQUISHMENT BY PARENTS

2210-00

- A. If the custody of any legitimate child has by any judicial decree, been given to the mother, and the father for a period of one year shall wilfully fail to pay for the care, support and education of such child when able to do so, then the mother alone may consent to such adoption, but only after the father has been personally served with a copy of a citation requiring him to appear at the time and place set for the appearance in court under Sec. 227 of Civil Code; if the father can not be located for personal service, the same may be made by publication as provided for the publication of summons in Sec. 413 of the Code of Civil Procedure. (Sec. 224, Civil Code)
- B. When such father or mother has been judicially deprived of the custody and control of such child by order of the Juvenile Court, declaring such child to be free from the custody and control of either or both of his parents as provided in Secs. 701, 720, 775 - 786, Welfare and Institutions Code. (Sec. 224-1, Civil Code)
- C. Where such father or mother of any child has deserted the child without provision for its identification. (Sec. 224-2, Civil Code)
- D. Where such father or mother of any child has relinquished said child for adoption as provided in Sec. 224m of Civil Code. (Sec. 224-3, Civil Code)
- E. Where such father or mother, whose consent is otherwise required, has been declared by a court of competent jurisdiction of this or any other state to be feeble-minded or insane, if the State Director of Institutions or the superintendent of the State hospital of which, if any, such father or mother, is an inmate or patient, certify that such father or mother, will not be capable of supporting or controlling the child in a proper manner. (Sec. 224-4, Civil Code; see Form Adop M50, Certificate by Supt. State Hospital in Lieu of Consent.)

(Section Continued on Next Page)

2200-00 CONSENT DISTINGUISHED FROM RELINQUISHMENT

2200-00

A. Consent:

A consent to adoption, which is an essential part of each independent or stepparent adoption, is a statement in writing signed by the natural parent that he gives his full and free consent to the adoption of his child by specified petitioners whose names appear on the consent form which he signs. The signing of consent does not terminate his rights to, nor responsibility for, the child, nor does it transfer custody of the child to the petitioners.

B. Relinquishment:

The relinquishment, which is an essential part of each agency adoption is a statement in writing signed by the natural parent that he relinquishes the child to a specified licensed adoption agency for placement for adoption. The agency, in accepting relinquishment, assumes full responsibility for the child, selects the adoptive home, places the child, and joins in the petition for adoption. When the relinquishment is accepted by the agency and filed with the State Department of Social Welfare, the parents' rights to, and responsibility for, the child are terminated. The natural parents need not know the names of the adoptive parents, and do not consent to the adoption.

2205-00 CONSENTS OR RELINQUISHMENTS REQUIRED

2205-00

Consent of Parents to Adoption

The following provisions refer to the fact of consent, and apply both to the consent used in independent or stepparent and to the relinquishment used in agency adoptions.

A. A legitimate child can not be adopted without the consent of its parents if living.

B. An illegitimate child can not be adopted without the consent of his or her mother if living. (Secs. 200, 224, Civil Code)

1. A child born to a married woman is presumed to be legitimate, but there may be judicial determination that the mother is entitled to sole custody. (Secs. 193, 195, 231, Civil Code) See Sec. 2290-00, Sole Custody, Consent or Relinquishment.

2. The consent of the father of a child born out of wedlock is necessary if the father has adopted it as provided for in Sec. 230, Civil Code.

3. If the parents of an illegitimate child marry before the petition for adoption is acted upon by the court, the consent of the father must be secured.

(Section Continued on Next Page)

2210-00 (Continued)

2210-00

- (e) The certificate may be signed for the Director of the Department of Institutions or by the Deputy Director. The authority for this is contained in Sec. 865, Political Code, which provides that each deputy possesses the powers and may perform the duties attached by law to the office of his principal, unless otherwise provided for.

2215-00 THE CHILD'S CONSENT

2215-00

The consent of a child, if over the age of 12 years is necessary to its adoption. (Sec. 225, Civil Code) The law does not specify whether this consent shall be written or oral, nor in whose presence it shall be signed. The following methods are used:

A. In an independent or stepparent adoption:

1. Written consent signed before a notary public may be secured by the attorney and filed with the petition;
2. Written consent may be signed in the presence of the Judge of the Superior Court at the time of the adoption hearing;
3. Before the investigating agency files its report to the court, it must ascertain whether the child wishes to be adopted by the petitioners. In an independent adoption, written consent may be signed in the presence of the agent of the SDSW or county adoption agency.

B. In an agency adoption:

The agency will ascertain whether the child wishes to be adopted by the foster parents before it joins in the petition for adoption.

2220-00 PETITIONERS CONSENT

2220-00

- A. Each spouse must consent to the adoption of the child by the other spouse, provided the husband or wife is capable of giving such consent. This is true whether both spouses join in the petition or one spouse petitions. (Sec. 223, Civil Code)
- B. The law does not specify whether this consent shall be written or verbal, or in whose presence it shall be signed.
 1. It is customary to have such consent signed in court.
 2. Such consent is sometimes secured in writing, witnessed by a notary and filed by the petitioners or their attorney.

2210-00 (Continued)

2210-00

1. Procedure for Securing Certificate under Sec. 224-4, Civil Code in Lieu of Consent of Parent Committed to State Hospital.

- (a) When a parent of a child to be adopted is an inmate or patient of a State hospital, a clearance with the State hospital should be made before a certificate of the State Director of Institutions or the superintendent of the State hospital is requested in lieu of consent, as every person committed to a State hospital would not necessarily be incapable of "supporting or controlling the child in a proper manner."
- (b) As soon as it is learned that the parent is in a State hospital or on parole from one, clearance with the hospital should be initiated. Since every case presents a different situation, the clearance will of necessity be based on the facts of the case. The following points, however, should always be cleared:
 - (1) Date and place of commitment.
 - (2) Terms of commitment.
 - (3) Whether or not a guardian has been appointed; if so, the date and place.
 - (4) Whether the person is on parole, or parole is contemplated.
 - (5) Social History.
 - (6) Diagnosis.
 - (7) Prognosis.
 - (8) Whether in the opinion of the superintendent of the hospital or the Director of Institutions the patient is, or will be, capable of supporting or controlling the child in a proper manner.
 - (9) Whether or not the parent's condition would have hereditary significance affecting the adoptability of the child.
- (c) If the prognosis is good or the superintendent or director states that in his opinion the patient will be capable of supporting and controlling the child in a proper manner, the consent of the parent to the adoption (or relinquishment if it is an agency adoption) will be necessary. Ordinarily if the patient were on parole, the official would not sign the certificate.
- (d) The certificate may be accepted when the statement that the parent will not be capable of controlling or supporting the child in a proper manner is qualified by such phrases as "I believe" or "in my opinion." In such cases, however, the recommendation in the court report should be made conditionally, provided the court finds that the provisions of Sec. 224-4, Civil Code, have been met.

(Section Continued on Next Page)

2235-00 FORM OF CONSENT OR RELINQUISHMENT

2235-00

A. Consent

1. In every adoption where the parents' consent is necessary, either independent or stepparent, the consent must be on a form prescribed by the State Department of Social Welfare, except when an agency licensed by the State Department of Social Welfare is a party to the adoption. (Secs. 224m, 227, Civil Code)
2. The Department provides separate forms for stepparent adoptions, for independent adoptions, for use of parents residing in California, and for parents residing outside California.
3. The Department or county adoption agency may furnish the attorney with forms for use outside California, but the preferred procedure is for the Department or county adoption agency to secure such consents.

B. Relinquishment

1. There is no provision in the law regarding the form of the relinquishment which must be executed by the parent surrendering a child to an agency. Forms for use by Adoption agencies are therefore prescribed by the SDSW.
2. When the parent resides outside the State at the time of relinquishing the child to an adoption agency in California, the relinquishment may be signed before a notary on a form prescribed by the SDSW and previously signed by an authorized official of the agency, signifying the willingness of the agency to accept the relinquishment. (Sec. 224m of the Civil Code)

2240-00 CONTENT OF CONSENT OR RELINQUISHMENT

2240-00

A. Consent:

It is desirable, before filling out the consent form, to have at hand a copy of the petition for adoption and a copy of the child's birth certificate in order that complete and accurate information may be recorded on the consent before signature.

It is the responsibility of the agent taking the consent to see that the full names of the petitioners appear on the consent at the time the parent signs the forms. The information shall be made available to her and she shall not be prevented from reading the names on the consent. The agent shall not refuse to witness the consent even though the parent may not choose to read the names.

When the birth certificate and petition for adoption, or either of them, is not available at the time the consent is signed by the parent, it is advisable to have the parent fill in the information required.

(Section Continued on Next Page)

2225-00 CONSENT OF SDSW OR ADOPTION AGENCY

2225-00

A. In an Independent Adoption

1. In all cases in which the consent of the natural parent or parents is not necessary, the State Department of Social Welfare or county adoption agency shall, prior to the hearing of the petition, file its consent to the adoption with the clerk of the Superior Court of the county in which the petition is filed. (Sec. 226, paragraph 4, Civil Code)

If the parent or parents whose consents are necessary die after signing consent but before the adoption hearing, the consent of the SDSW or county adoption agency will be necessary. The consent of the parent or parents may be filed with the court report as evidence of the parents' wishes, but the adoption cannot be granted legally on the basis of the parents' consent alone. See Sec. 2105-00 for procedure on filing the report.

2. If the father or mother of a child to be adopted is outside the State of California, his or her consent may be signed before a notary and in such case the consent of the Department of Social Welfare will also be necessary. (Sec. 226, paragraph 8, Civil Code)

B. In an Agency Adoption (Relinquishment)

The agency to which the child has been relinquished and by which it has been placed must join in the petition for adoption and consent to the adoption. The consent may be included in the allegations of the petition. (See Form for Petition in Agency Adoption) .

2230-00 CONSENTS NOT REQUIRED

2230-00

Although there is no legal requirement that consents shall be obtained from the following persons or agencies, it is desirable that they be interviewed and that a statement of their attitude towards the adoption be obtained:

1. The guardian of the person or of the estate of the child
2. The Juvenile Court when the child is a ward of the court
3. The children of the petitioners

In determining the suitability of the adoptive home consideration should be given to the attitudes of the prospective brothers and sisters and their acceptance of a new member to the family group and to the expressed opinion or reaction of the child or children fourteen years of age and over.

2245-00 (Continued)

2245-00

Exception:

If the parent relinquishing the child is outside the State of California at the time of signing relinquishment, it may be signed before a notary public on a form prescribed by the agency and previously signed by an authorized official of the agency, signifying the willingness of the agency to accept the relinquishment. (Sec. 224m, Civil Code)

See Section 2250-00 for instructions regarding witnessing signature by mark.

2250-00 SIGNATURES ON CONSENT OR RELINQUISHMENT

2250-00

When the parent signing the consent or relinquishment is known by more than one name, all names shall be signed, for example "Mildred Moore Smith," also known as "Mildred Jackson".

If the parent can not sign his or her name, signature by mark may be accepted, but it must be witnessed in accordance with Section 114 of the Civil Code, which provides that such mark shall be witnessed by two persons who must subscribe their own names as witnesses to the document.

2255-00 CORRECTIONS OR ALTERATIONS ON CONSENT OR RELINQUISHMENT

2255-00

Consents and relinquishments are legal documents signed before witnesses, and can not be corrected or altered unless the corrections and/or alterations are initialed by the parent signing the document and by the agent who witnessed the consent, or by the authorized official of the agency before whom the relinquishment was acknowledged.

2260-00 FILING OF CONSENT OR RELINQUISHMENT

2260-00

- A. In an independent adoption the consent of the natural parent or parents to the adoption must be filed with the clerk of the Superior Court in the county in which the petitioners reside. (Sec. 226, paragraph 1, Civil Code)
- B. In a stepparent adoption, where one natural or adoptive parent retains his or her custody or control of said child, the consent of either or both parents, signed in the presence of a county clerk or probation officer of a county of the State, shall be immediately filed with the clerk of the Superior Court of the county where the petition is filed, and said clerk shall immediately file a certified copy of such consent to adoption with the State Department of Social Welfare, (Sec. 226, paragraph 7, Civil Code)

(Section Continued on Next Page)

2240-00 (Continued)

2240-00

B. Relinquishment:

Information on the relinquishment for the parents' signature may be taken from the child's birth certificate or the hospital record.

The name of the agency to which the child is being relinquished shall appear on the form when it is executed by the parent.

2245-00 WITNESSING CONSENT OR RELINQUISHMENT

2245-00

A. Consent

1. In an independent adoption the consent of the parent must be signed in the presence of an agent of the State Department of Social Welfare or of a licensed county adoption agency. (Sec. 226 Civil Code) It is recommended that the signature of the natural parent be witnessed by another person also, if possible.
2. In an adoption by a stepparent, where one natural or adoptive parent retains his or her custody and control of the child, the consent of either or both parents must be signed in the presence of a county clerk or probation officer of any county of the State. (Sec. 226, paragraph 7, Civil Code)

3. Exception:

Non-residents: If the father or mother of a child to be adopted is outside the State of California, at the time of signing consents, his or her consent may be signed before a notary or other person authorized to perform notarial acts, and, in such case, the consent of the State Department of Social Welfare will also be necessary but such consent shall not be necessary where the adoption is by a stepparent and one natural parent retains custody and control of the child. (Sec. 226, paragraph 8, Civil Code; AGO 7861, 8548, 9116)

When the consent is signed before a notary in another State it is necessary to have attached to the consent a certificate from the clerk of a court of record of the county or district where such acknowledgment is taken that the officer certifying to the same is authorized by law to do so, and that the signature of said officer to such certificate is his true and genuine signature. (Sec. 1189, Civil Code; AGO 7861)

B. Relinquishment:

A relinquishment must be signed before two subscribing witnesses and acknowledged before an authorized official of the licensed adoption agency accepting the relinquishment.

(Section Continued on Next Page)

2275-00 TIME OF TAKING CONSENT OR RELINQUISHMENT

2275-00

A. Consent

There is no legal requirement regarding the time at which a consent shall be taken during the course of the investigation of an independent adoption. Since the Department or county adoption agency has no jurisdiction until the petition has been filed, consent should not ordinarily be signed before Notification of the Pendency of the Action is received from the county clerk.

Exceptions:

1. Consent properly executed by a parent outside the State at the time of signing may be filed with the petition.
2. Circumstances of an individual case may warrant such exception.

When it is possible, a sufficient investigation of the case should be made to determine the advisability of the adoption before the consent is signed. It will sometimes be necessary, however, to take the consent from the natural parent or parents before the investigation is begun. Regardless of the time at which consents are signed, it should be made clear to the parents that neither their rights to, nor responsibilities for, the child are terminated by signing consent, and that it may be withdrawn by them at any time prior to the final court action on the petition.

It should be explained to the parent that the taking of consent by the SDSW or county adoption agency does not necessarily mean that it will approve the adoption; that it will be approved only if the investigation indicates that the adoption is for the child's best interests; and that it is necessary for him or her to keep in communication with the Department or county adoption agency until the adoption is completed.

The consent of the natural mother shall never be witnessed by an agent of the Department or county adoption agency while the natural mother is still in the hospital or maternity home after confinement for the birth of the child. The mother should have sufficient time to recover physically and emotionally from the experience of childbirth before making her decision and signing the consent.

Consent should not be signed unless the parent is giving full and free consent to the adoption. If the mother seems to be in doubt, the agent should suggest that she take further time to make up her mind before signing.

(Section Continued on Next Page)

2260-00 (Continued)

2260-00

- C. In an agency adoption the relinquishment to an adoption agency shall be of no effect whatsoever until a certified copy is filed with the State Department of Social Welfare, after which it may be rescinded only by the mutual consent of the parties. (Sec. 224m, Civil Code)

If there is question of the child's adoptability, the agency may postpone filing the relinquishment with the State Department of Social Welfare until a determination of adoptability can be made.

2265-00 WITHDRAWAL OF CONSENT OR RELINQUISHMENT

2265-00

A. In Independent Adoptions

The natural mother of an illegitimate child and either natural parent or both of a legitimate child may withdraw their consent to the adoption of their child at any time before the actual issuance of the order of adoption by the court. (See Forms Adop M30, Withdrawal of Consent (illegitimate) and Adop M31, Withdrawal of Consent (legitimate))

B. In Agency Adoptions

The relinquishment to the agency does not become final and binding until it is filed with the State Department of Social Welfare, and may be withdrawn at any time prior to the filing. After it is filed with the SDSW it may be rescinded only by the mutual consent of the parties.

2270-00 CONDITIONAL OR PROVISIONAL CONSENT OR RELINQUISHMENT

2270-00

A. Consent

Every consent is actually conditional at the time it is signed, dependent on the results of the investigation and the recommendation of the SDSW or county adoption agency and on the parents' continued willingness to have the adoption completed. It may contain no conditional provisions, however, for retaining any rights by the parents after the adoption is consummated.

B. Relinquishment

When relinquishment of a legitimate child is not taken from both parents at the same time, it should be made clear to the parent signing first that the relinquishment will not be accepted as valid until the child is also relinquished by the other parent or proper action in lieu of relinquishment is completed.

2290-00 SOLE CUSTODY CONSENT OR RELINQUISHMENT

2290-00

The statement of the person signing consent or relinquishment that she is entitled to sole custody of the child is prima facie evidence of the right of the person to the sole custody of the child, and such person's sole right to consent or relinquish. It is not conclusive evidence of that fact, however, and may be refuted by other verified information.

When there is a presumptive father or more than one presumptive father of the child, consent or relinquishment, as the case may be, must be obtained from the presumptive father or fathers unless a court order is obtained refuting the presumption of legitimacy.

When there is no consent or relinquishment from the presumptive father or fathers and no court action has been taken to refute the presumption of legitimacy, a recommendation of approval can not be given. Procedure in such cases will be as follows:

- A. In an independent adoption as soon as the investigation indicates that there may be a question regarding the legal status of the child and that the mother desires to consent as having sole custody, there shall be an immediate clearance with the attorney calling to his attention the necessity for some action to clear parental relationship. The advantage of having this determination precede the final report shall be discussed with him, i.e., that there be no delay or possible cloud on the adoption. It is also important to have this discussed at an early point in the investigation, as only the mother or father may question the parental relationship and the attorney will wish to take action while the parent is available. (AGO 7948, NS 3778)

It is preferable that a copy of the court order determining paternity or overcoming the presumption of legitimacy be submitted before the final report is filed so that a definite recommendation of approval can be made by the Department or county adoption agency.

If such an order has not been obtained, however, conditional approval may be given in the court report if the attorney states that he will have a hearing on the question prior to the adoption hearing and the facts disclosed by the investigation by the Department or county agency support the mother's claim that she is entitled to sole custody.

- B. In an Agency Adoption the child should not be placed in an adoptive home until it is legally free for adoption.

2275-00 (Continued)

2275-00

If the parent states that she believes adoption to be the best plan for the child and is willing to consent to the particular adoption if the SDSW or county adoption agency finds the home to be suitable, the consent may be witnessed with the understanding that the parent will keep the agency informed of her whereabouts until the investigation is completed.

B. Relinquishment

Relinquishment should be taken only after the mother has had time to recover physically and emotionally from her confinement, and when possible, by the worker who has established a relationship with her.

Before relinquishment is signed by the parent or parents the agency shall explain to them the nature of the relinquishment and its finality when it is once filed with the SDSW, but they should be informed that they may change their decision at any time prior to the filing, and that the agency may also change its decision to accept relinquishment.

2280-00 REFUSAL TO CONSENT OR RELINQUISH

2280-00

1. Independent Adoption

The parent or parents of a child who are unwilling to consent to its adoption may sign a formal refusal to consent, witnessed by an agent of the Department or county adoption agency (Form Adop M20, Adop M23). This is not a requirement, however, and the parent or parents' signed statement in a letter or otherwise, or a verbal statement to the agent of the Department or county adoption agency may be accepted as evidence of unwillingness to consent to the adoption.

2. Agency Adoption - (Relinquishment)

No formal refusal to relinquish a child is necessary. The parent entitled to custody of the child may refuse to accept agency service and may remove the child from care at any time.

2285-00 FAILURE OR REFUSAL TO ACCEPT CONSENT - INDEPENDENT ADOPTION

2285-00

If for a period of 180 days from the date of filing the petition, or upon the expiration of any extension of time granted by the court, the Department or the licensed county adoption agency fails or refuses to accept the consent of the natural parent or parents to the adoption; or if the Department or agency fails or refuses to file or give its consent to an adoption in those cases where its consent is required, either the natural parent or parents or the petitioners may appeal from such refusal to the Superior Court of the county in which the petition is filed (Sec. 226, paragraph 9, Civil Code)

INVESTIGATION - INDEPENDENT ADOPTIONS

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5. To prepare the Order of Adoption. (Sec. 227, Civil Code)
 6. To have the case set for hearing in the Superior Court of the county in which the petition is filed.
 7. Generally the attorney will appear in court with the petitioners. He may make court appearance for the petitioner in military service if it is impossible or impracticable for the petitioner to be present, when commissioned and empowered in writing so to represent him. (Sec 227, Civil Code)
 8. To file in the office of the county clerk the Order of Adoption. (Sec. 227, Civil Code)
 9. To prepare for completion by the county clerk the Certificate of Adoption. (Sec. 10250, Health and Safety Code)
- C. Data desired by Department or county adoption agency and requested from attorneys:
1. Copy of petition for adoption.
 2. Address of petitioners.
 3. Address of natural parents.
 4. Certified copy of birth certificate of the child.
 5. If necessary, other verifications such as marriage or death certificates or verification of dissolution of marriage.

2320-00 THE PETITION

2320-00

The petition for adoption should be reviewed and each statement checked to see that all necessary points are covered. If the investigation reveals discrepancies in the petition (such as petitioners' residence in another county or the omission of the signature of one petitioner), these should be discussed with the attorney immediately in order that the petition may be corrected or amended if necessary. (See Sec. 2100-00, Procedure for Filing Petition).

2330-00 THE OBJECTIVES OF THE STUDY

2330-00

- A. To determine whether the parent's consent is voluntary, and given only after full consideration of possible satisfactory alternatives which might be possible through the child's family or through community resources.
- B. Whether the child is legally free for adoption.
 1. That the parent's consent, properly executed, is given where required.

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2300-00 NATURE OF THE INVESTIGATION

2300-00

"No hard and fast rules can be laid down as to what should be included in an adoption investigation. Certain general standards of procedure must serve as guides, but the plan for each investigation must depend on the circumstances involved. At no time should the procedure be permitted to become routine; otherwise the purpose of the investigation is likely to be obscured by the necessity for gathering routine information. Just as each child is an individual, so each adoption investigation must be planned individually."¹

2310-00 CONTACTS WITH ATTORNEY

2310-00

The agent should communicate with the attorney during the progress of the investigation and should keep him informed of the status of the case, clearing any necessary points with him. If the petitioners do not have an attorney (the law does not require that petitioners be represented by an attorney), necessary points should be discussed with them.

A. It is the agent's responsibility:

1. To work closely with the attorney, as the petitioners' legal counsel, submitting to him for consideration any problem which may arise during the course of the investigation.
2. To discuss the case with the attorney before filing a recommendation for denial.
3. To give the attorney a copy of any report or findings submitted to the court. (Sec. 226, Civil Code)
4. To discuss with the attorney any proposed extension of time or recommendation of denial.

B. It is the attorney's responsibility:

1. To prepare and file the petition to the Superior Court of the county in which the petitioners reside. (Sec. 226, Civil Code)
2. To clear any legal barriers to the adoption.
3. To prepare (1) the agreement which the petitioners must execute or acknowledge in writing, stating that the child shall be treated in all respects as their lawful child, and (2) the consent of each spouse to the adoption of the child by the other spouse. (Secs. 223 and 227, Civil Code)
4. To prepare the consent to the adoption by a child over 12 years of age. (Sec. 225, Civil Code; see Appendices)

(Section Continued on Next Page)

¹U. S. Children's Bureau (Publication No. 262, Mary Ruth Colby, Problems and Procedures in Adoptions, Washington, D. C., 1941, p. 68)

A. Birth Information

The agent shall obtain and review the birth certificate as soon as possible and shall compare the name, date, place of birth, and names of parents with information obtained from the parents, the petition and the questionnaire. Discrepancies shall be reconciled if possible and those which can not be reconciled shall be reported in the narrative and in the court report.

If the investigation discloses that the child's birth was not registered within one year after birth, the agent may accept in lieu of the birth certificate other verifications of the identity of the child, such as, a baptismal certificate, hospital record, other documentary evidence, or affidavits of persons having knowledge of the time and place of the birth of the child.

In such a situation the agent should suggest to the petitioners or their attorney that they wait until after the adoption is granted and file an application for delayed registration of birth. This should be filed in the new name of the child, giving the name of the adoptive parents as the natural parents and making no reference to the fact that an adoption has occurred.

If the child is foreign born, the agent shall obtain all possible information regarding entry into this country from the parents and/or the petitioners. (See Sec. 2690-00, Citizenship or Legal Entry)

B. Medical Reports and Examinations

The agent shall obtain reports from the physician attending the birth of the child and from the pediatrician, hospital, clinic, or other physician currently attending the child. (See Sec. 2655-00, Acceptable Medical Reports, and Sec. 2660-00, Health)

C. Psychometric and Psychiatric Reports

Psychometric and/or psychiatric examinations shall be required when observation of the child or information obtained regarding undesirable or questionable background indicates it, or when the child's background is unknown. (See Sec. 2680-00)

D. The Child's Development

The agent shall obtain the developmental history of the child (physical, mental, social) from natural parents, physicians, petitioners, institutions, school, etc., as indicated. If clearance is made with a school, utmost caution should be used in obtaining it and in discussing the information with the petitioners. When clearance seems advisable, it should be initiated only after discussion with the supervisor. The agent shall observe the child and talk with him and shall

(Section Continued on Next Page)

2330-00 (Continued)

2330-00

2. That the parent's consent, where otherwise required is not necessary under provisions of Sec. 224, Civil Code.
3. Whether the child is suitable for adoption, from the standpoint of health, heredity, intelligence and personality.
4. Whether the petitioners' motives for adoption are sound.
5. Whether the petitioners are suitable adoptive parents for this child, consideration being given to age, health, emotional stability, harmonious home life, understanding of children, financial security, cultural level, and background.
6. Whether the child is well adjusted in the petitioners' home.
7. Whether adoption will provide opportunity for the full development of the child's potentialities.
8. Whether the child will be brought up in a religious faith acceptable to his natural parents if that is known. If the petitioners are not of the same religious faith as the child's parents, this subject should be discussed with the parents and their express approval should be given before their consent to the adoption is accepted by the Department.

2340-00 FINDINGS FOLLOWING THE STUDY

2340-00

On the basis of its investigation the agency will make the decision:

- A. That adoption is for the child's best interest and future welfare, and should be recommended; or
- B. That adoption will provide legal protection not otherwise available for the child, and for this reason should be recommended, although unfavorable recommendation might otherwise be made on basis of the facts disclosed; or
- C. That the favorable factors involved (taking into consideration the length of time the child has been in the home, and the probable damage to the child by removal from the home) outweigh other unfavorable factors in the situation and merit recommendation of the petition; or
- D. That adoption is not for the best interest of the child and that its recommendation should be that the petition be denied.

An adequate investigation will include not only the gathering of facts in regard to the adoption, but an analysis and evaluation of the facts obtained. The value of the recommendation will depend upon the validity of the findings of the agent making the investigation. Methods for obtaining and verifying information will vary with the individual case.

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2350-00

relaxed, or, in certain instances, omitted altogether. The routine medical examination shall be required if it is indicated, the decision to be made on the basis of the age of the child, the length of time he has been in the petitioners' home, whether he is related to the petitioners, and whether there seems to be any necessity for an examination.

2360-00 THE PETITIONERS

2360-00

A. Questionnaire

The questionnaire, Form Ad 9 - Rev., regarding petitioners and the child, together with authorizations to be signed by them for release of medical, social and employment information, shall be mailed or taken to the petitioners immediately. When the questionnaire and forms are returned they shall be reviewed and checked for completeness. All the information requested in the questionnaire is essential.

B. Interviews with Petitioners

1. Place: Both petitioners should be seen together and with the child, at least once in their home environment during the investigation period. The first contact with the petitioners may be at the time they come to the office early in the investigation period, to clear some point; but the agent ordinarily would not attempt to conduct a full first interview at this time.
2. Appointments: Home visits may be made by appointment, but, if the agent considers it advisable, she may make visits without previous announcement. The interview or interviews with the man petitioner may always be made by appointment. If the man petitioner is away and will not be available for interview in the home, he may be interviewed at such other place as is convenient.
3. Time: Since the agent should have some knowledge of the foster home and parents before discussing the consent and placement with the natural parents, the petitioners should be seen first if possible. Information in regard to the family should be up to date at the time of the court report. This will sometimes necessitate a contact with the petitioners just prior to the filing of the report. This may be by personal interview in the home or office, telephone conversation, or by letter, if personal contact is not possible.
4. Objective of visit to the home: The purpose of visiting the home of the petitioners is to observe the physical conditions in the home, the atmosphere of the home, the adjustment of the various members of the family to each other, the attitude of other members of the household toward the child, and the care being given the child. If possible, each petitioner should be interviewed

(Section Continued on Next Page)

2350-00 (Continued)

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consider his development in the light of accepted developmental norms. (See Appendicies for Information on Development of Child at Different Age Levels.)

E. Adjustment in the Home

The agent shall observe and evaluate the adjustment of the child to the petitioners, their household, and the home. If the child is old enough to express an opinion, she shall discuss with him the pending action and his wishes regarding his adoption. If the child is under twelve, however, she should respect the wishes of the petitioners in regard to discussing his adoption with him.

F. Placement

The agent shall determine: (a) who placed the child and under what circumstances; (b) whether the natural parents and petitioners are related to each other or known to each other by name or sight; (c) how long the child had been in the petitioners' home prior to the filing of the petition for adoption.

G. Legal Status of Child

Complete information regarding the legal status of the child shall be obtained to show whether the child is legitimate, illegitimate, orphan, half-orphan, left without means of identification, declared free from custody and control of his parent or parents, or a child having a legal guardian of his person or estate. (See Sec. 2620-00)

H. Variations in Requirements for Investigation of Child

1. When the child being adopted is an infant, at least 150 days should elapse before the final report is filed and the Department's recommendation is made. Exception may be made only in unusual circumstances.
2. When a child is being adopted for the second time, the investigation shall cover the reasons for the replacement, the child's adjustment in the new home, his health, mental and social development, and the usual complete investigation of the petitioners. It will not be necessary, however, to repeat in the case record the basic information in regard to the child.
3. When the child has been in the home of the petitioners for years, when he is an older child who has been in the petitioners' home long enough for them to adjust to each other, and consents to his adoption, or when he is a close relative of the petitioners, all the basic information shall be obtained regarding the child and the petitioners and vital statistics shall be verified, but collateral contacts and more intensive social investigation may be

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2360-00 (Continued)

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markedly from the usual age at completion, agent should discuss reasons); employment or employment history; marriages, and reasons for divorces, if any; information concerning children born to previous marriages. (If the children are minors, the question of their support should be discussed and verified.)

Relatives: Education of parents and siblings, their occupations, health--mental and physical; and any other pertinent information concerning them, including general family health history. (Names and addresses of siblings need not necessarily be obtained.)

Health: Physical and mental, including institutional record, if any.

Religion: Church attendance, participation in church activities attitudes toward religion and church.

Citizenship: If foreign born, information concerning when and where citizenship was acquired should be obtained and verified. If not a citizen, information concerning legal entry should be verified.

Interests: Community activities, membership in clubs or organizations, hobbies, talents, recreation, etc.

(g) Man Petitioner: The same subheadings may be used as shown for woman petitioner. Employment may be shown under a separate heading for him to include more details. Separate headings may also be used for military service and clearance of veteran's status. Information regarding the man petitioner's background and relatives, furnished by the woman petitioner ordinarily should be corroborated by him.

(h) Petitioners' Children: Full information concerning the petitioners' children, if any, their development and care, education, occupation, health, etc., and their attitude toward the child to be adopted. If they have never had children, their statement of the reason why.

(i) Inheritance Rights of the Adopted Child: Do the petitioners understand that the child will inherit from them equally with any natural children?

(j) Finances: Financial situation including earnings, income, real property, savings--if none, the reason, debts, obligations, insurance, previous financial status, including any contacts with social agencies.

(k) Other Necessary Discussion not covered under preceding topics,

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separately as well as together. This is important in determining whether each petitioner wishes to adopt the child, has a sincere interest in him, and wishes to consummate the adoption.

5. Content of the interviews: If conflicting information is given in the questionnaire, verifications, or interviews, the agent shall discuss this with the petitioner concerned in an attempt to reconcile the discrepancies. This shall be recorded in full in the narrative. Information given by one petitioner regarding the other petitioner's history should be corroborated by the other.

The interviews with the petitioners should cover the following information. Form Adop M67, Outline for Interview with Petitioners, may be used as a guide during the interviews and in recording.

- (a) Introduction: Date, persons interviewed, place of interview.
- (b) Housing and Household: Brief description of the home, the neighborhood, availability of schools, composition of the household, atmosphere, etc.
- (c) Minor: Brief description of developmental history to date; adjustment in the home; attitudes of the petitioners, their relatives and other members of the household toward the minor and the proposed adoption.
- (d) Plans and Training: This should be discussed with both petitioners. The discussion should cover plans for the child's education and religious training their understanding of child care and training; discipline; and whether he will be told of his adoption. If the woman petitioner is employed, the discussion should include plans for care of the child in her absence.
- (e) Placement: This should be discussed with both petitioners. Discussion should cover why petitioners wish to adopt the child; how they obtained him; date of placement; whether placement has been continuous; who assisted in making the placement (this should include names, addresses and information in detail); whether the petitioners are related to the parents, are friends or acquaintances, or have not met the parents; how much they know about the parents; whether they assisted the parents financially, and if so, to what extent; their attitude toward the parents and regarding the child's background or regarding the lack of information if it is limited or completely lacking.
- (f) Woman Petitioner: Description

Background: Date, place of birth, nationality descent; education (if age at completion of grade or high school deviates

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2370-00 (Continued)

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district office in which the prison is located, as soon as the necessary information is received from the warden the agent to whom the case is assigned shall send a regular inter-office request, with full information to the district which renders the service.

If the warden reports that the parent is unwilling to sign consent, the agent to whom the case is assigned shall send the warden a form for refusal to consent, with the request that he have the parent execute it. This can be signed without the restoration of the man's civil rights, as it is not a contract and does not involve any change in his status.

It is important that the agent make her contact with the warden immediately in any case where a parent is in a State prison, as the request for the restoration of his civil rights must be referred by the warden to the Adult Authority. If the matter is not cleared within a reasonable length of time (six weeks), after the request is made, follow up should be made by the agent.

If the parent is in prison in another state, the agent shall arrange to have him interviewed and his consent obtained according to instructions shown in Sec. 2710-00, Intra-State and Inter-State Requests.

If the parent is committed to a State hospital, the agent shall follow the procedure outlined in Sec. 2210-00.

If the parents are outside the State, if possible the necessary information should be obtained by requesting a social agency in the other state to interview them; otherwise, it may be obtained directly from the parents through correspondence.

If the parents of the child are a married couple, the same type of information should be obtained for each, according to the outline for interview. If the husband is not the father of the child, no background information regarding him is necessary, but full information should be obtained from the mother regarding the background of the natural father. Information should also be obtained from her regarding her husband's knowledge of the birth of the child and his attitude toward the adoption. If the mother is willing to have him interviewed, the placement and adoption shall be discussed with him.

In all cases in which the child is born out of wedlock, or is not the child of the mother's husband, the natural father shall be interviewed if the mother will permit and if he is available. If this is not possible, the mother shall be asked to give whatever information she can regarding the natural father, whether he acknowledged paternity, and whether he may have adopted the child under Section 230 of the Civil Code.

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2360-00 (Continued)

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such as verification of vital statistics if they were reviewed in the home, or explanation of conflicting information appearing in the questionnaire, verifications, or interviews.

- (1) Agent's Evaluation of Suitability of Home, considering all significant factors, especially the opportunity which the home offers for the best development of the particular child, in relation to the time the child has been in the home:

There should be flexibility in the use of the outline. When the petitioners are interviewed separately the headings as listed are satisfactory. When they are interviewed together it may be more logical to list each petitioner's statement under the same topic, rather than covering the topic separately under the name of each petitioner. In some instances all the information may be obtained in one interview, but in other instances several interviews may be necessary to obtain all the information.

2370-00 THE NATURAL PARENTS

2370-00

A. Interviews with Parents

If the parents (or parent) are in the State, they shall be interviewed personally. If they reside in the district, in which the petition is pending, the interviews shall be arranged by the agent handling the case. If they reside in another district, the agent shall request the district office or county adoption agency where the parents reside, to interview them. (See Sec. 2710-00, Intra-State and Inter-State Requests.)

If the parent is in a State prison, the agent to whom the case is assigned shall write to the warden's office at the prison requesting:

1. A summary of any history and tests.
2. That the man be informed of the pending adoption.
3. That he be interviewed regarding his attitude toward the adoption.
4. That the agency be notified of his willingness or unwillingness to consent.
5. If the parent is willing to consent, that he have the parent make the necessary request to the warden to have his civil rights restored for the purpose of executing the consent, and that the warden notify the agency when an agent may interview the parent and take his consent.

As the interview with the parent will necessarily be made by the

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feeble-mindedness, tuberculosis, diabetes, eczema, or allergies, commitments to State or private hospitals or prisons (secure details).

Some discussion of family life, social problems, if any; whether they were known to an agency; mother's relationship to her family, past and present.

Which relatives know about the child? Would the mother permit discussion of plans with relatives? Did any participate in planning for adoption?

5. Health: Physical and mental, including institutional records, if any. Usual health and any history of unusual illness, physical, mental or nervous disorders. Information should be obtained regarding medical care received by the mother and record of physician's examinations, laboratory tests for venereal diseases, tuberculosis, etc., if any. Name and address of present physician. Name and address of doctor attending the birth of the child; statement of health during pregnancy and delivery; prenatal care.
6. Religion: Church membership, if any. If no active religious connection, what was background or former training; preference for religious training of child.
7. Marriages and dissolutions: Secure names of spouses, date and places of marriages; date, place and nature of dissolution; if divorce, separation, or annulment, what is reason given by mother. Mother should be told that it will be necessary to verify information given regarding marriages and dissolutions.
8. Children: Other than child being adopted. Secure names, dates, and places of birth; present address; if not with mother, what plans did she make for them; education; if in school, name of school, grade; developmental history--was it usual; if retarded in walking, talking, etc., record and give mother's explanation; health--any unusual illness; occupation, if employed. Do they know about the child who is being adopted?
9. Child to be Adopted: Name as given on birth certificate and other names used. Place of birth, date of birth; name of hospital where born; if not born in hospital, give address. If child not placed at birth, give history of development to the time of placement. Did mother care for child or what was plan for care? Health history; i.e., congenital diseases, childhood diseases, immunization.
10. Placement: Date made, was it continuous? If interrupted, explain. When was plan for placement made? Why was placement made? Were other plans considered? Did mother know about adoption agency services? Did she reject them and why? Who assisted in making

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2370-00

If the child has been previously adopted, information regarding the natural parents shall be obtained from the adoptive parents and from the court and agency records which are available. The adoptive parents shall be interviewed for information on the development of the child, his adjustment in their home, and the reason for the second placement.

B. Timing and Number of Interviews

Where possible, the petitioners should be interviewed prior to the interview with the natural parents, as the parents may wish information regarding the petitioners, and the care the child is receiving in their home before making a decision as to their consent to the adoption. If it has not been possible to interview the petitioners prior to the interview of the natural parent, the agent shall ascertain whether the parents wish to be contacted again after the investigation is completed. It shall be made clear to the parents that should the investigation reveal information which would result in a recommendation of denial by the State Department of Social Welfare, they will be contacted.

C. Content of the Interview

The interviews with the parents should cover the following information. The outline which is also issued as Form Adop M67, "Information Concerning Parent of Child to be Adopted," covers the same information and may be used as a guide during the interview and in recording. In some instances all the information may be obtained in one interview but in other instances several interviews may be necessary before all points are covered.

1. Introduction: Date, persons interviewed, place of interview.
2. Mother: The agent should secure the present name, maiden name and any aliases; the usual and present address of the mother. She should also record a brief description of the mother, showing height, weight, color of eyes, color of hair and general coloring. She should also give a brief statement of the mother's personality, temperament and general impression created.
3. Background: Date and place of birth, nationality descent, education (if age at completion of grade or high school deviates markedly from the usual age at completion, agent should discuss reasons), employment or employment history, special talents, hobbies and aptitudes which might be of interest to the petitioners.
4. Relatives: Mother, father, siblings: Secure names, addresses, education, health, occupation--present and usual (also discuss briefly mother's grandparents, uncles and aunts, to show educational and occupational pattern for family). Any history of unusual illness, physical or mental, or nervous defects, epilepsy,

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2380-00 (Continued)

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the SDSW, the agent shall also send notification to the accredited agency, with copy to the member of the SDSW field staff concerned, that the child is in the home and that the agency has recommended denial of the petition for adoption, specifying the reason for denial. If the petition is being investigated by a county adoption agency, copy of notification to the accredited agency need not be sent to SDSW.

- E. If the home is unsuitable and the condition is a flagrant one, either by reason of the character of the petitioners or the treatment being given to the child, the case shall be referred to the Juvenile Court by the agency. This may be done verbally or in writing, but all essential information should be given to the court. If it is given verbally, the narrative shall contain a statement of what information was given, when given, and to whom.

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2370-00

placement, i.e., physician, nurse, mutual friend? (Secure this information in detail, including name and address, and organization, if any, with which the individual was connected.)

Are petitioners related to mother, or friends over a long period? If the mother and the petitioners were not acquainted before, how long have they known each other? Has the mother been in the petitioner's home? How much does she know about the petitioners? Mother's evaluation of the home? Does she understand that all her contacts with her child may be broken? Did the petitioners pay medical or confinement expenses, assist her financially in any way? Does this influence her consent?

If the mother still does not know the petitioners, does she wish further information?

Does she have any preference regarding the racial or educational background of petitioners?

11. Father: Secure the same information as shown for mother. If the mother of the child is unmarried, the agent should examine the facts to see if there is a possibility that the child may have been adopted by the father under Section 230 of the Civil Code. (See Sec. 2620-00)

2380-00 ACTION FOLLOWING FINAL REPORT RECOMMENDING DENIAL

2380-00

In those cases on which the recommendation is to be denial because the child is not a proper subject for adoption; because the child of questionable or unknown background is too young for adequate physical and psychometric testing; because some statutory provision has not been met; or, because the home is not a suitable one, but the indications are that the child will remain in the home, action should be as follows:

- A. In the majority of cases the natural mother should be notified, giving her the reason for denial and informing her that the child will remain in the home of the petitioners.
- B. In some instances it may be well to recommend legal guardianship proceedings as a safeguard for the child.
- C. If the child is in the home of a relative, is receiving good care, and the home situation is satisfactory, no further action will be necessary.
- D. If the child is under sixteen years of age, is not related to the petitioners, and the home situation is not sufficiently bad to indicate Juvenile Court action, the agent shall notify the petitioners at the time of filing the report that a boarding home license will be necessary if the child remains in their home and shall furnish them with the name of the accredited agency and if the petition is being investigated by

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- (f) Application for renewal of a permit or license shall be filed 10 days prior to its expiration each year. If the application is not so filed, the license or permit is automatically canceled. Where a hearing is held under this section the proceedings shall be conducted in accordance with Chapter 5 of Part I of Division 3 of Title 2 of the Government Code, and the department shall have all powers granted therein. (Sec 1624, Welfare and Institutions Code)
- (g) Any person other than a parent or any organization, association, or corporation that, without holding a valid and unrevoked license or permit to place children for adoption issued by the State Department of Social Welfare, places any child for adoption is guilty of a misdemeanor. (Sec. 224q, Civil Code)
- (h) Any person or organization that, without holding a valid and unrevoked license or permit to place children for adoption issued by the State Department of Social Welfare, advertises in any periodical or newspaper, by radio, or other public medium, that he or it will place children for adoption is guilty of a misdemeanor. (Sec 224p, Civil Code)

B. Functions of an Adoption Agency

1. Connected with Placement---(Relinquishment Program---public or private agency.)

To find homes for and place for adoption children legally relinquished by parents for adoption. This would include:

- (a) Service to natural parents considering adoption plan.
- (b) Study of the child to determine whether he is adoptable, may include accepting the child and responsibility for care.
- (c) Acceptance of relinquishments of children. This includes responsibility for care, covering housing, food, clothing, personal needs, medical and dental services, and psychiatric services when necessary.
- (d) Pre-placement studies of homes of applicants for children.
- (e) Selection of home and placement of child.
- (f) Supervision of child in the home.
- (g) Approval of adoption.
- (h) Completing the adoption through court action.

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2410-00 LICENSING PROCESS

2410-00

A. Legal Basis

1. No person, association, or corporation shall, without first having obtained a written license or permit therefor from the State Department of Social Welfare or from an inspection service approved or accredited by the Department.

(a) Maintain or conduct any institution, boarding home, day nursery, school other than a school conducted by an established religious organization, or other place for the reception, care, or education of children under sixteen years of age, nor engage in the business of receiving or caring for such children, nor receive nor care for any such child in the absence of its parents or guardian, either with or without compensation.

(b) Engage in the finding of homes for children under sixteen years of age, or place any such child in any home or other place, either for temporary or permanent care or for adoption. (Sec. 1620, Welfare and Institutions Code)

(c) Any county may apply for, and the State Department of Social Welfare may issue to any county officer or county agency designated by the county making the application, a license under Chapter 1 of Part 3 of Division 2 of the Welfare and Institutions Code, to perform the home-finding and placement functions specified in subdivision (b) of Section 1620 of said code, to investigate, examine, and make reports upon petitions for adoption filed in the superior court in that county, to act as a placement agency in the placement of children for adoption, to accept relinquishments for adoption, and to perform such other functions in connection with adoption as the State Department of Social Welfare deems necessary, or to do any of them.

A license issued to a county officer or agency pursuant to this section constitutes the holder thereof a "county adoption agency" and the holder shall be deemed to be an "organization" within the meaning of those terms as used in this chapter. (Section 225m, Civil Code)

(d) The State Department of Social Welfare shall make such rules and regulations as it deems best for the government of any institution or for the performance of any service specified in Sec. 1620 (Welfare and Institutions Code) and the Department may (by a member or any duly authorized representative) inspect and examine any such institution, home or place or the performance of any such service. (Sec. 1621, Welfare and Institutions Code)

(e) A permit or license issued by the State Department of Social Welfare or by an approved and accredited inspection service shall expire 12 months from its date of issuance. (Sec. 1623 Welfare and Institutions Code)

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Applications shall be accompanied by:

- (a) Written statement of the proposed plan of operation. This shall include the administrative plan, a current organization chart of the agency showing the administrative and functional relationships of all units and divisions, and proposed plan for providing office space, equipment, and transportation.
- (b) Number of staff employed or to be employed in the adoption program.
- (c) Training and experience of staff to be employed in the adoption program.
- (d) Copies of any agency policies, procedures, instructions or manuals relating to children's programs.
- (e) Copy of the proposed budget for the adoption program.

3. Renewal applications will follow the procedure outlined for original applications except that the written statement submitted with the application may be limited to any changes which have occurred since the last application. Although the legal requirement for filing renewal application states that the renewal must be filed 10 days before the expiration of license, the SDSW operating staff should be informed of the intentions of the agency at least 30 days before the expiration date, in order that the agency may be kept currently licensed.

An agency which has filed its application for renewal of license within the time specified by law shall be deemed to be operating under a license of the SDSW until such time as the application has been acted upon.

E. Licensing Study

After receiving any application for license the State Department of Social Welfare will make an evaluation of the agency to determine action to be taken. This evaluation will include a review of the application and supporting material and a study of the agency.

F. Supervision

The State Department of Social Welfare shall maintain a supervisory relationship to licensed adoption agencies.

2420-00 STANDARDS FOR CHILD PLACING AGENCIES:

2420-00

The following Standards for Child Placing Agencies shall apply to any agency requesting license to perform any adoption function.

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2. Connected with independent adoptions--(Consent adoptions--public agency only)

To investigate independent petitions referred to the agency for investigation by the State Department of Social Welfare. This would include:

- (a) Study of child and his parents to determine whether he is a proper subject for adoption.
- (b) Study of adopting parents and their home to determine whether it is suitable for the child.
- (c) Acceptance of consents of natural parents.
- (d) Preparation of report to the court recommending granting or denial of the petition.

(For additional information see Chapter on Investigation of Independent Adoptions.)

C. Policy with respect to SDSW Licensing:

1. Public Adoption Agencies.

The State Department of Social Welfare will license only one public agency to serve in a given county for the adoption program.

2. Private Adoption Agencies

The State Department of Social Welfare will license private agencies meeting a definite need not already met in the community, when the agency's program is coordinated with other community welfare services.

D. Application Procedure

- 1. Application for license to conduct an Adoption Agency shall be made on forms provided by the State Department of Social Welfare and shall be signed by the Executive Officer of the agency and the Chairman or President of the agency board.
- 2. Application forms may be obtained from the State Department of Social Welfare District Office serving the area in which the county agency or private agency is located. The forms and supporting material should be prepared in triplicate, two copies to be submitted to the State Department of Social Welfare district office, which will retain the original and send one copy to the Child Welfare Division, Sacramento. The third copy may be retained for the agency files.

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for license only when it meets a need not already met and when its program is coordinated with other community welfare services.

(b) Private Child Placing Agencies

Non-Profit and Philanthropic Nature

The agency must be organized and operated on a non-profit and philanthropic basis.

Such an organization must be coordinated with the other social services in the community.

The existence of a social agency is justified only when it meets a definite need not already met, and when its program is coordinated with other community welfare services.

The agency should be a member of or eligible to membership in the council of social agencies of the community in which it operates.

Incorporation

The agency should be incorporated under Div. I, Part IV, Title XII of the Civil Code on non-profit corporations.

A corporation is better able to discharge the obligations and assume the responsibilities required for an acceptable standard of child care.

The Articles of Incorporation of an incorporated agency stating the purpose of the agency in broad terms must be filed with the Secretary of State at Sacramento, and copies of the Articles of Incorporation and amendments made thereto must also be filed with the State Department of Social Welfare.

Constitution and By-Laws

Regardless of whether the agency is incorporated, a constitution shall be established setting forth the purpose of the organization, and a copy of such constitution and the by-laws shall be filed with the State Department of Social Welfare. The by-laws shall set forth the functions of the corporation and the means whereby the functions are to be carried out.

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LICENSE REQUIRED TO ENGAGE IN CHILD PLACING

No person, association, or corporation shall, without first having obtained a written license or permit therefor from the SDSW or from an inspection service approved or accredited by the Department:

- A. Maintain or conduct any institution, boarding home, day nursery, school other than a school conducted by an established religious organization, or other place for the reception, care, or education of children under sixteen years of age, nor engage in the business of receiving or caring for such children, nor receive nor care for any such child in the absence of its parents or guardian, either with or without compensation.
- B. Engage in the finding of homes for children under sixteen years of age or place any such child in any home or other place, either for temporary or permanent care or for adoption. (Sec. 1620, Welfare and Institutions Code)

Any persons other than a parent or any organization, association or corporation that, without holding a valid and unrevoked license or permit to place children for adoption issued by the SDSW, places any child for adoption is guilty of a misdemeanor. (Sec. 224q, Civil Code)

Any county may apply for, and the State Department of Social Welfare may issue to any county officer or county agency designated by the county making the application, a license under Chapter 1 of part 3 of Division 2 of the Welfare and Institutions Code, to perform the home-finding and placement functions specified in subdivision (b) of Section 1620 of said code, to investigate, examine, and make reports upon petitions for adoption filed in the superior court in that county, to act as a placement agency in the placement of children for adoption, to accept relinquishments for adoption, and to perform such other functions in connection with adoption as the State Department of Social Welfare deems necessary, or to do any of them. (Sec. 225m, Civil Code)

PART I - ADMINISTRATION

(SECTIONS AS THEY APPLY SPECIFICALLY TO COUNTY ADOPTION AGENCIES OR PRIVATE CHILD PLACING AGENCIES ARE INDICATED)

1. Organization(a) County Adoption Agencies

The agency must be designated by the County Board of Supervisors as the single public agency in the county through which adoption services will be offered. It will be considered

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- (b) Interpretation of the service of the agency to the community, and the community to the staff of the agency.
- (c) The establishment of the policies to be followed by the agency.
- (d) The exercise of trusteeship for property and investments.
- (e) The approval of the budget and responsibility for the obtaining and receiving of adequate funds.
- (f) Employment of a well-equipped executive for the agency, and delegation to that executive responsibility for administration and employment of other staff members.
- (g) The maintenance of an informed, alert, and interested membership.
- (h) Maintenance of a full membership.

Committees of the Board*

Provision shall be made for the appointment of standing committees and such temporary or special committees as are needed. All Committees shall entrust administrative details to the executive and committees shall work with the executive, who in turn should meet with such committees.

Generally, the following standing committees are desirable:

- (a) Executive Committee
- (b) Finance Committee
- (c) Personnel Committee
- (d) Case Committee

Relationship Between Board and Executive

There shall be proper division of responsibilities between the board and executive in order that an efficient administration may be provided. The board shall delegate to the executive the responsibility for administration, but the board shall determine the major policies and the general plan of operation based upon its knowledge of case problems, and community needs. The general policy of the board shall be to include the executive at all regular meetings.

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* "Purpose and Form of Organizations in the Field of Child Care and Protection," Child Welfare League of America, 1938, contains valuable suggestions as to organization and function of committees.

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2. Governing Board - Private Child Placing Agencies

The constitution of the child placing agency shall provide for control by a responsible governing board.

Practice has indicated that a board of not less than nine members is desirable, and to avoid unwieldiness, a board should generally not exceed twenty-one members.

Representation of Governing Board

Members shall have an interest in child welfare, a concern for social conditions in the community, and must have sufficient time to discharge their obligations as board members. They shall be persons representative of the community in which the agency operates. The board shall include in its membership a variety of interests, talents, and points of view such as lawyer, physician, clergyman, educator, builder, merchant, so arranged that no single group or profession shall have a controlling vote. Members of the Board should be of both sexes.

Board members shall serve without compensation. No board member shall profit financially by reason of his membership nor be employed by the agency regularly either full time or part time.

Election of Members of Board

Members shall be elected by the supporting membership or by a representative body for a definite term of office with expiration of terms so arranged that a rotating board results.

Provision shall be made for the replacement of members who become inactive for a protracted period of time.

The overlapping of terms and election of one-third of the board membership annually is recommended to insure reasonable continuity of policy, as well as new and changing points of view.

Meetings of the Board

Board meetings should be held once a month for ten months of the year at least. Minutes of the board shall be kept.

Duties of the Board

The board shall formally adopt a written statement of its responsibilities to which the members agree. These shall include:

- (a) Responsibility to the community for adequate services to the children under care.

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Personnel policies shall be developed by the agency. Policies should be formulated in writing and made available to the staff. Personnel policies, salaries, and working conditions shall be such as to attract and hold competent, well-qualified staff and to stimulate their professional growth.

Number of Staff

The number of staff shall be adequate for the scope of the agency's services. In general, an executive, case supervisor, case workers, and clerical staff are necessary. Additional professional services for the medical, dental, psychometric and psychiatric needs of the children served should be available.

The Executive - PRIVATE CHILD PLACING AGENCIES

The executive shall have professional training in the field of child welfare or have demonstrated unusual ability and leadership through experience as an executive in the field of child welfare.

When the organization of the agency may necessitate, the executive shall have such other qualifications as are required for the additional duties he may have to assume, such as supervision of case work.

Duties of the Executive

The duties of the executive shall include the following:

- (a) Responsibility for appointing and dismissing staff, and working closely with personnel committee of the board.
- (b) Responsibility for attending all regular board meetings and committees of the board, making reports concerning agency activities, and interpreting recognized standards of child care to the board.
- (c) Responsibility for holding regular staff meetings to discuss plans and policies.
- (d) Responsibility for organizing and carrying out a program of staff development for all staff members, and for arranging for attendance of staff at social work conferences and other meetings which assist in professional growth and effectiveness.
- (e) Responsibility for carrying out a child care program in conformity with recognized standards of modern child care.
- (f) Responsibility for leadership and stimulation in community planning for child welfare.

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3. Finances - Private Child Placing Agencies

The agency shall be soundly financed to insure an adequate standard of service.

It shall have sufficient funds for providing the services which it offers and to provide continuing care for children relinquished to it who may require prolonged study or treatment before placement, children who may be returned to it by the foster parents during the supervisory period, and children who may not prove to be adoptable.

If budget limitations exist, the scope and size of the agency's services shall be curtailed to the point that an adequate standard of service is maintained on the basis of the available funds.

Policies and practices governing receipt and expenditures of money shall be in accord with sound budgeting, disbursement and audit control procedures. An annual audit by a certified public accountant should be provided. Financial records shall be maintained of receipts, disbursements, assets and liabilities.

Any fees charged shall be clearly defined as such at time of application for service and shall be based upon an actual sharing of costs of service.

There shall be no solicitation as a condition to placement of a child for adoption.

4. Personnel

Qualifications of Staff

Staff members shall be fitted by character, personality, health, education training and experience for work with parents and with children in foster homes. The staff of the agency must have educational training and/or experience in family or child welfare work.

The great responsibility which a child placing agency assumes in the lives of children who have been deprived of normal family and community relationships makes it particularly important that staff be carefully selected and well qualified.

Selection and Tenure of Staff

Employment and tenure of position shall be based solely upon competence.

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Basic Principles in Child Care

Services provided shall give evidence that the following principles of child care have been adhered to:

- (a) A child's own home and family are the natural setting in which the child's social and personality growth normally occur and his own home and family are a basic right of each child.
- (b) Primary emphasis shall be placed upon skillful and understanding professional service to parents rather than upon custodial care of their children. Emotional growth and personality development are determined by the child's first relationships to his own parents and siblings. The child's own family should be assisted in every possible way to meet the child's needs in his own home.
- (c) The type of service provided shall be based upon a consideration of the wishes of and participation of his parents, a consideration of the child's individual needs, and his family situation. Knowledge and understanding of the physical, intellectual, emotional, and social development of the child are essential to effective case work.
- (d) A child should be cared for away from his own family only after efforts to bring about favorable conditions within the home for normal development have been unsuccessful. Every child who must leave his home to live away from his own family suffers a profound emotional and social disturbance.
- (e) Foster home care must provide opportunities for maximum development of the child's native capacities and must further his development into an adequate adult personality.

Initial Study

Decision as to acceptance for service shall be based upon clearly defined but flexible agency policy, and shall be based upon a complete social study of the total situation of the child in order that the ultimate welfare of the individual child is served.

The social study shall be recorded and should make certain;

- (a) As complete a knowledge and understanding as possible of the family and present situation to determine what available resources might be used to preserve family ties before removal of the child from his family.

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Case Work Supervisor

Case supervisors shall be employed to be responsible to the executive for the adequate performance of case work services. The standard of one case supervisor to six case workers should be maintained. Case supervisors shall meet the following qualifications: (1) successful completion of two years of graduate work in an accredited school of social work and at least three years of experience in a case work capacity in the field of family or child welfare, at least one year of which should have been in the field of child placement; or (2) successful completion of one year of graduate work in an accredited school of social work, at least three years of experience in a case work capacity in the field of family or child welfare, at least one year of which should have been in the field of child placement, and at least two years of experience in the capacity of case work supervisor; or (3) successful completion of one year of graduate work in an accredited school of social work and at least three years of experience in a case work capacity in the field of family or child welfare, at least one year of which should have been in the field of child placement, and demonstrated ability within the agency for promotion to case work supervisor.

In an agency which does not have a case work supervisor, the executive shall meet these qualifications.

Case Workers

Staff members engaged in case work service should have successfully completed two years of graduate work in an accredited school of social work, or one year of graduate work in an accredited school of social work and at least two years' experience in the field of child welfare or family welfare, or, if one year of graduate work has not been completed, then the case worker shall have had at least four years' of paid experience in the field of child welfare or family welfare.

The duties of the case worker include making social studies, and planning and carrying out social treatment dealing with family situations, home finding, and case work with children, including the use of psychometric, psychiatric, and other specialized services as needed.

Clerical Staff

An adequate clerical staff shall be maintained.

5. Office Space and Equipment

The agency should be housed in offices which are adequately equipped, which provide privacy for interviewing and which are conveniently located for the public.

PART II SERVICES

(THIS APPLIES TO BOTH COUNTY ADOPTION AGENCIES AND PRIVATE CHILD PLACING AGENCIES)

1. Services to Children

The processes of intake, placement, supervision, and termination of care shall be in accord with present-day accepted standards of child care and social case work.

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- (i) Adequacy of supervision with respect to frequency of visits to the child, and foster family (or institution) and own family shall be maintained. The frequency of such visits shall be determined by the circumstances of each case and the discretion of the agency.

The case load of a worker giving full time to the supervision of children in foster homes shall not exceed fifty children. If the worker carries other responsibilities such as recruitment or home finding, intake, or work with children with serious emotional disturbances, or work with children in their own families, or the geographical area to be covered is widespread, the case load shall be proportionately reduced.

- (j) Psychological study, direct treatment by a psychiatrist or psychiatric consultation to aid the case worker in treatment shall be provided by the agency for those children accepted for care who require such specialized professional services.
- (k) Foster homes used for children under sixteen years of age shall be those which conform to the Standards for Boarding Homes for Children as developed by the State Department of Social Welfare.
- (l) The agency should assume responsibility for the continued supervision and education of foster parents with respect to the physical, intellectual, and emotional needs of children and sound principles of child care by means of periodic visits to the home, and by such other devices as the stimulation of parent study groups, institutes, dissemination of literature, books, and pamphlets on child care, as are feasible.
- (m) The use of a foster home by more than one agency should be avoided as much as possible by agreements between the agency and foster parents and with other community agencies using foster homes.
- (n) The agency shall maintain adequate case records of each child and family which shall include a face sheet, report of original study, and progress reports of the child under care and work with the child's family. Case records should be organized in a manner that will aid in understanding the child and his family and developing plans for his care. The record shall contain medical records, reports of initial medical examination, continuous record of communicable diseases and illnesses, and medical treatment. School reports, psychological reports, legal papers, etc., should also be filed in the child's record.

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- (b) Knowledge and understanding of the child's physical and mental status, personality, emotional adjustment, his attitudes and attitude of family toward situation and toward placement or other treatment.
- (c) The participation of the child and the family to the full extent of their abilities in the agency plan for care or referral to other community resources which better meet his particular needs.

Placement and Supervision

- (a) Children should be placed only in homes within a geographical area in which it is possible for the agency to give adequate supervision.
- (b) Children shall be placed in foster homes of the same religious faith as that of the child, or in accordance with the desire expressed by the parent.
- (c) Children shall be placed in homes of the same racial and national background when this is possible.
- (d) The economic and occupational background of the child's family and the foster family should not be too divergent in placements.
- (e) Children of the same family shall be kept together whenever possible unless it has been determined that this is not beneficial.
- (f) The selection of a foster family home or group care in an institution for a particular child shall be based upon consideration of the individual child's total needs (health, educational, religious, recreational, social, and emotional) and how well the particular foster family can meet the child's needs and potentialities or how well the institutional program will fulfill the child's needs.
- (g) Unless the child has been permanently removed from the custody of his parents, or the placement is in an adoptive home, every effort shall be made to strengthen family relationships and to help parents make a responsible plan for the permanent care of their children.
- (h) The agency shall make certain that adequate and appropriate clothing, recreational allowances, continuing medical and dental care are provided for each child.

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- (f) Continuing observation of the child's developmental progress and discussion with the physician of any deviations from satisfactory conditions.
- (g) Health instruction, adequate nutrition, and training in sound physical and mental health habits shall be shared by parents, foster parents, case worker, and physician.
- (h) When adoption placement is contemplated for an infant, a report from the obstetrician delivering the child shall be obtained before acceptance of the child for care.

Termination of Care

- (a) Termination of agency care shall be determined by case work study and planning. In placement for adoption, the agency responsible for care shall be terminated by the granting of the adoption by the court.
- (b) Continuous study of the home and planning with the family and child shall precede the return of the child to his parents or relative. Arrangements shall be made for adequate follow-up service and supervision according to the child's needs.

Reports and Statistics

- (a) Current administrative records shall be maintained by the agency in such a form as to provide an index to all cases including location of children under care and including all foster homes in use.
- (b) Financial records shall be kept current showing nature and source of income and nature of expenditures.
- (c) Such monthly statistical reports shall be submitted as the State Department of Social Welfare requires.
- (d) Copies of current policies and procedures on adoption agency shall be submitted to the State Department of Social Welfare as adopted by the board of the agency.
- (e) Such other records and reports shall be maintained and submitted as required by the State Department of Social Welfare.

2. Additional Requirements in Adoption Services

The focus of the agency shall be on finding homes for children for whom adoption appears to be the best plan, rather than on providing children for applicants.

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- (c) Separate records shall be maintained of each foster home studied and used by the agency and should include periodic evaluation of the home. A record should be kept of all children cared for in each home, and dates of care received there. When child is placed for adoption, the child's record and the foster home records should be combined.

Medical Care

The agency shall provide adequate preventive and remedial medical care through a qualified physician, preferably a pediatrician or through a clinic organized to provide the necessary medical service. The physician responsible for medical care of the children under supervision should be paid for his services.

The agency should secure authorization for medical care from parents or legal guardians.

Medical care provided shall include:

- (a) Complete physical examination, including examination of eyes and ears (prior to placement whenever possible; no placement should be made without a prior clearance as to freedom from communicable disease unless suitable isolation is maintained); prompt treatment of remediable physical conditions; necessary laboratory tests and inoculations.
- Immunization of children over six months against diphtheria and vaccination against smallpox; immunization of children under six years against whooping cough; provision for tuberculin test or chest X-ray for each child; provision for nose and throat culture, vaginal smear, and Wasserman where indicated.
- (b) For infants continuous medical supervision; for older children physical examinations at least annually or oftener as recommended by the physician or as the child's development and condition indicates.
- (c) In cases of illness or accidents, and provision for medical care and hospitalization as required.
- (d) Dental examinations semi-annually followed by necessary treatment; arrangements for orthodontic care for children requiring this care.
- (e) Competent psychological and psychiatric treatment or consultation for those children who require such service.

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The agency shall place special emphasis on the study of the individual child and his needs in order that it may select the home which will offer the best potentialities for his full development.

The placement of a child for adoption shall be contingent upon a thorough study of the prospective adoptive parents to determine their fitness as parents and the suitability of their home for the particular child. This shall include consideration of age, health, mentality, personality, character, religion, cultural background and status, education, financial security, standard of living, marital status, harmony of home life, understanding of children, and motives for adoption.

There shall be a supervised interim period of one year between the placement and the final adoption. This may be shortened only upon the written approval of the State Department of Social Welfare.

The frequency of supervisory visits to the home by the agency shall be determined by the circumstances of each case and the discretion of the agency, but in no instance shall there be less than one visit each quarter.

The identity of the adoptive parents shall not be revealed to the natural parents.

Adoptive parents shall be furnished with full information regarding the family background of the child, the child's development, and the results of tests and examinations. They may be furnished with the names of the natural parents only at the time the agency is ready to complete the adoption.

Applicants for Children

The agency shall maintain a list of approved homes sufficiently large to provide a wide basis of choice in selecting the home which will best meet the needs of the individual child.

All applicants shall be given equal consideration. The order in which applications are received shall in general determine priority in making the home study and approving a home for placement of a child.

The selection of a particular home for the placement of a child shall be made solely on the basis of serving the best interests of the child, and shall in no way be influenced by any payment or contribution over and above the fee (if any) set for service to adoptive parents, by the source of referral, nor by the order in which applications were received.

The agency shall not accept for service a case in which the placement of a child has been so promised that the agency is not free to make a different placement.

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Services to Natural Parents

The agency shall provide adequate services to natural parents, including counseling and referral to other agencies when indicated, and shall see that help is given to parents in thinking through and making the best plan for the child.

The study of the natural parents relinquishing a child for adoption shall include the history and family background of each, their marital status, education, occupation, citizenship, health—physical and mental—religion and religious preference for the child, temperament and personality.

Acceptance of Relinquishments of Children

The agency shall accept a relinquishment of a child for adoption only after a thorough study has been made to determine:

- (a) That the parents have come to the decision to surrender him with knowledge that all ties will be permanently severed with the surrender, full awareness of all the implications, and with knowledge of other resources available to them.
- (b) That adoption is for the child's best interest.
- (c) That the child is legally free for adoption.
- (d) That the child is a proper subject for adoption.

By accepting a relinquishment of a child from a parent, the agency shall assume full responsibility for the child, its care and support, relieving the parents of further responsibility.

A relinquishment once given and filed with the State Department of Social Welfare shall be binding and can be canceled only by mutual consent of the natural parent and the agency.

No relinquishment shall be accepted before the child is born or while the mother is still in the hospital or maternity home following the birth of the child.

Placement for Adoption and Supervision

No child shall be placed in an adoptive home until:

- (a) All necessary relinquishments have been obtained and filed with the State Department of Social Welfare.
- (b) It has been determined by proper tests and examinations that he is adoptable.

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regarding undesirable or questionable background indicates the need for it. (See Sec. 2680-00)

D. The Child's Development

1. The agency shall obtain as complete a history as possible concerning the maternal and paternal ancestry of the child, and consideration should be given to any possible hereditary factors in both the maternal and paternal histories. (These can be evaluated in only the grossest way as they may affect the probable inherited constitution of the child, since adjustment to life is the result of personalities built on childhood, emotional environment, and life experiences, as well as on original constitution.)
2. The agency shall make an effort to estimate the economic and social adjustment of the immediate relatives.
3. The agency shall observe the behavior of the child, as a knowledge of characteristic reactions and his responses are important guides in selecting the right family for the child, estimating his aggressiveness or timidity, sociability or seclusiveness, adaptability, emotional security, etc. (See Appendix, Behavior Characteristic of Certain Age Levels)
4. If the child was not placed at birth, the agency shall obtain a history of its development to the time of placement.

E. Legal Status of Child

1. The agency shall obtain complete information regarding the legal status of the child to determine whether the child is legitimate, illegitimate, orphan, half-orphan, left without means of identification, declared free from custody and control of his parent or parents, or a child having a legal guardian of his person and/or estate.
2. The agency shall review the facts in the case to determine whether relinquishments of living parents are necessary.
3. In connection with the adoption of every illegitimate child, the agency shall give consideration to the following possibilities:
 - (a) Whether there has been an adoption under Section 230, Civil Code. (See Sec. 2070-00)
 - (b) Whether the child has been legitimated by the marriage of the natural parents prior to the filing of the mother's relinquishment with the SDSW. (See Sec. 2205-00)

2430-00 THE CHILD - BASIC STUDY REQUIREMENTS

2430-00

A. Birth Information

The agency shall obtain and review the birth certificates as soon as possible and shall compare the name, date, place of birth, names of parents, and number of other children born to the parents with information obtained from the parents and other sources. If the investigation discloses that the child's birth was not registered within one year after birth, the agency may accept in lieu of the birth certificate other verifications of the identity of the child, such as, a baptismal certificate, hospital record, other documentary evidence, or affidavits of persons having knowledge of the time and place of the birth of the child. (See Sec. 2615-00)

Discrepancies shall be reconciled if possible and those which can not be reconciled shall be reported in the narrative and in the court report.

B. Medical Reports and Examinations

1. The agency shall obtain reports from the physician attending the birth of the child (in all cases of infants and as deemed advisable in cases of older children) concerning complications of pregnancy and birth, condition of the child, and reports of tests and examinations. (See Secs. 2655-00, 2660-00, and 2665-00)
2. Infants shall have continuous medical supervision, preferably under a physician specializing in the field of pediatrics.
3. A report from the pediatrician attending the child shall be obtained prior to adoption placement, giving the physician's statement as to whether the child is ready for placement. This report shall include blood tests for syphilis. If the child is not an infant and the history shows that he has been under medical care, reports from all physicians rendering such care should be obtained.
4. Infants in adoptive homes shall have continuous medical supervision and quarterly reports from the attending physician, preferably a pediatrician, shall be obtained. The agency shall obtain a report on an examination made in the month prior to completing the adoption.
5. Older children in adoptive homes shall have physical examination at least annually, or oftener, as recommended by the physician, or as the child's development and condition indicate. The agency shall obtain a report on an examination made in the month prior to completing the adoption.

C. Psychometric and Psychiatric Reports

1. The agency shall obtain psychometric and/or psychiatric examinations when observation of the child or information obtained

(Section Continued on Next Page)

2440-00 (Continued)

2440-00

G. Health of Parent

The agency shall obtain as much information as possible regarding the physical and mental health of the natural parents, from their own statements, from medical reports if available, from records of agencies and other sources, and from the workers' observation.

When the child to be adopted is an infant, a report shall be obtained from the obstetrician. If the parent is under the care of a physician or has been recently under care, a report shall be obtained from him. (See Secs. 2655-00, 2660-00 and 2665-00)

H. Religion

The agency shall obtain information regarding church membership, if any, religious background or former training, preference for religious training of child, whether the child to be adopted has been baptized, and if so, in what church.

I. Marriages and Dissolutions

The agency shall secure:

1. Names of spouses.
2. Dates and places of marriages.
3. Date, place, and nature of any dissolution; if divorce, separation or annulment, reason given by parent.

The parents should be told that it will be necessary to verify information given regarding marriages and dissolutions and should understand why verifications are necessary. (See Sec. 2625-00)

J. Children--other than child being adopted

The agency shall obtain names, dates, and places of birth; present address; if not with parent or parents, what plans were made for them; education; if in school, grade; developmental history--the parents' explanation; if retarded in walking, talking, etc.; health--any unusual illness; occupation, if employed; whether they know about the child who is being adopted.

K. Relinquishment

If the child is legitimate and is being relinquished by both parents, the full information as outlined should be secured from each parent. If the child is illegitimate and the mother is willing to have the natural father interviewed, full information should be obtained from him. If she is not willing to have him interviewed, or he is not known, as much information as possible regarding him and his family should be obtained from the mother. (See Chapter on Consent and Relinquishment and Chapter on Case Work in Child Placing)

2440-00 THE PARENTS - BASIC STUDY REQUIREMENTS

2440-00

A. Counseling Service

The agency, recognizing the right of a child to live in his own home whenever possible, shall assume responsibility for seeing that the family ties are not unnecessarily broken and that help is given to the parents in thinking through the best plan for the child.

B. Names and Addresses

The agency shall secure the present name (maiden name), and any aliases; the usual and present address; and address where parent may be contacted at any time until relinquishment is final. The agency shall clear with the Social Service Exchange. (See Sec. 2605-00)

C. Description of Parents

The agency shall record a brief description of the parents including: height, weight, color of eyes, color of hair and general coloring.

D. Personality and Temperament.

The agency shall record a statement of the personality, temperament and general impression created for each parent, and the attitude of the parent toward placement.

E. Background Information

The agency shall obtain background information, including date and place of birth, nationality descent, education (if age at completion of grade or high school deviates markedly from the usual age at completion, reasons should be discussed), employment or employment history, special talents, hobbies, and aptitudes which might be of interest to the petitioners.

F. Relatives

The agency shall obtain information regarding relatives, including names, addresses, education, health, occupation--present and usual, for mother, father, and siblings of parent; information regarding grandparents, uncles and aunts, to show educational and occupational pattern for family; any history of unusual illness, physical or mental, or nervous defects, epilepsy, feeble-mindedness, tuberculosis, diabetes, eczema, or allergies, commitments to State or private hospitals or prisons.

There should be discussion of family life, social problems, if any; whether family was known to an agency; parents relationship to family, past and present; which relatives know about the child? Would the parent permit discussion of plans with relatives? Did any relatives participate in planning for adoption?

(Section Continued on Next Page)

4. Attitude Toward Children

Attitudes toward children; physical defects; behavior problems; ability to understand insecurity of child and phases of development; plan for future and education; understanding own responsibility in creating behavior reactions on the part of the child; attitude toward illegitimacy; attitude toward factors of heredity and environment; understanding of legal implications of adoption; willingness to tell child that he is adopted.

5. Environment

Brief description of the home, the neighborhood, availability of schools, indications of culture, quality of surroundings.

6. Background Information

The background information including date and place of birth, nationality descent, education, if age at completion of grade or high school deviates markedly from the usual age at completion, reasons, employment or employment history (employment shall be verified--see Sec. 2635-00), special talents, hobbies, interests, participation in community activities, etc.

7. Relatives

Information regarding relatives including names, addresses, education, health, occupation--for mother, father and siblings of applicant, details of any history of unusual illness, physical or mental, or nervous defects, epilepsy, feeble-mindedness, tuberculosis, commitments to State or private hospitals, or prisons.

8. Marriages and Dissolution of Marriages

Shall be verified. (See Verifications-Chapter)

9. Health

History including usual health and any history of unusual illness, physical, mental or nervous disorders; institutional records, if any; medical reports including test for syphilis. (See Secs. 2655-00, 2660-00 and 2665-00)

10. Religion

Church affiliation or membership; church attendance; participation in church activities; attitudes toward religion and church; attitudes toward religious training of child; if no present religious connection; religious background and training.

(Section Continued on Next Page)

2450-00 APPLICANTS DESIRING TO ADOPT - BASIC STUDY REQUIREMENTS

2450-00

A. Application

Before the total study of the home is begun the agency should have on file a completed, signed application from the couple, together with signed authorizations for release of medical, social and employment information. Applicants shall give as references at least four persons and the agency shall contact these individuals to obtain an evaluation of the applicants and their home. The agency shall clear applicants with the Social Service Exchange. (See Verifications Chapter)

B. Interviews

There shall be at least one interview with the man applicant alone, and one interview with the woman applicant alone. These interviews may be in applicant's home, at the agency office, or at some other place.

There shall be at least two interviews with the applicants together. One of these interviews may be at the agency office but at least one shall be in the home of the applicants. The record shall include the date of interview, persons interviewed, and place of the interview.

There shall be at least two home visits and as many more as are necessary for the worker to make a fair evaluation of the applicants and their home.

In addition to the tangible factors of eligibility as outlined, the agency should explore with the couple the emotional factors involved in adopting a child and the procedures that will be covered as the couple progresses in its relationship with the agency.

C. Study

The study shall include information on the following:

1. Physical Description of Applicants

A brief description shall be recorded for each applicant and children of applicants.

2. Emotional Relationships and Personality

Personality of each individual in household; relationship of adoptive parents to each other; adjustment of the various members of the family to each other; relationships with relatives; attitude of immediate family and relatives toward adoption; emotional stability.

3. Reason for wanting a Child and Child desired

Motivation of desire to adopt child as articulated by clients and seen by worker; ability to have own child; preference of child, sex, age, description, potential abilities.

(Section Continued on Next Page)

B. Notice of Action

The agency shall notify the applicants in writing of the agency's approval or rejection of application. Ordinarily the agency will find it helpful to have an interview with the applicants prior to sending written notice of rejection in order to interpret the agency's action and to give the applicants the opportunity to work through this with the agency.

C. Applications Which Cannot Be Approved

There will be many intangible factors which will influence the decision of the agency but there are certain conditions which will preclude approval of an application.

No application shall be approved:

1. If the woman applicant is more than 40 years of age and the man applicant more than 45, for the placement of an infant. (Applications from older persons may be approved for the placement of older children in accordance with their age;)
2. If the applicant is single, whether unmarried, widowed, or divorced;
3. If any person in the home is suffering from a chronic illness, instability, or injury which would have an adverse effect upon the adopted child or limit the ability of the parents to care for the child or as a result of which one of the applicants does not have normal life expectancy;
4. If the applicants are not citizens of the United States;
5. If the applicants are not residents of the State and county;
6. If the family income, financial resources, and past and present employment are such as to indicate inability to provide adequate standards of health and education and opportunities for normal development.
7. If the placement of a particular child has been so promised that the agency is not free to make a different placement.

SELECTION OF HOME AND PLACEMENT FOR ADOPTIONA. Selection of home shall be based on the following factors:

The study of the individual child and his needs in order that the agency may select the home which will offer the best potentialities for his full development.

(Section Continued on Next Page)

2450-00 (Continued)

2450-00

For all applicants it is desirable to have as one reference the minister or pastor of the church attended by the applicants. For applicants who are members of the Catholic Church the agency shall obtain a statement from their parish priest or the local Catholic Welfare Bureau regarding the catholicity of the applicants.

11. Citizenship

If foreign born, when and where citizenship was acquired. (See Sec. 2690-00)

12. Applicants' Children

The applicants' children, if any, their development and care, education, occupation, health, etc.; if adopted, verification of adoption. If either applicant has had children by a former marriage, the whereabouts of the child, custody, responsibility for support, attitude toward child, etc.

13. Finances

Financial situation including earnings, income, real property, savings--if none, the reason, debts, obligations, insurance, previous financial status. (See Sec. 2650-00)

2460-00 APPLICATIONS, ACTION ON

2460-00

A. Evaluations

There shall be an evaluation of the suitability of the home, considering all significant factors, especially the opportunity which the home offers for the best development of a child. If the application is approved, consideration shall be given to the type of child who should be placed in the home. Evaluation may result in rejection of the application.

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2470-00 (Continued)

2470-00

Understanding and agreement that the agency may remove the child for cause at any time prior to completion of the adoption.

2475-00 SUPERVISION AFTER PLACEMENT FOR ADOPTION

2475-00

There shall be a supervised interim period of one year between the placement and the final adoption within which the parents can determine whether they wish to complete the adoption and the agency can determine whether this is the proper placement for the child. This period may be shortened only upon the written approval of the State Department of Social Welfare.

The frequency of supervisory visits to the home by the agency shall be determined by the circumstances of each case and the discretion of the agency, but in no instance shall there be less than one visit each quarter. At least two of the visits shall be made when all the family members are at home, in order to observe the child in the home, the adjustment of the adoptive parents and their children, if any, to the child, and the capabilities of the adopting parents as parents.

Supervision of the home shall include observation of the child's development and psychometric examinations if needed.

It shall include necessary medical care as well as the submission of required medical reports.

The agency shall keep informed of any changes in the adoptive home, such as marital status, social changes, health, employment, members of household, housing, etc.

The supervisory visits shall also be used as a constructive help to the adopting parents in meeting any problems of adjustment in the home.

2480-00 MATERIAL TO BE SUBMITTED TO STATE DEPARTMENT OF SOCIAL WELFARE 2480-00A. Case Material Regarding the Relinquishment Program

1. Notice of taking relinquishment, giving name of child, name of parent signing, and date signed;
2. A certified copy of the relinquishment, face sheet, and history of the child;
3. Face sheet material on applicants when application is taken;
4. Result of home study of applicants;

(Section Continued on Next Page)

2470-00 (Continued)

2470-00

The racial background and nationality background of the adopting parents and the child shall be similar.

The religious faith of the adoptive parents and of the child, or the child's parents shall be the same. If there is a difference in the religious faith, placement shall be made in accordance with the expressed wishes of the parents.

The personality, temperament, education, intelligence and cultural level, stature and coloring of the adopting parents shall be considered in relation to the personality, temperament, physical appearance, coloring, cultural background and potential mental ability of the child.

Children with special handicaps of a physical nature or related to personality or behavior, and those whose heredities suggest that problems may arise, should have homes selected with additional consideration of whether the adopting parents thoroughly understand and accept the child's condition and are able to meet his needs.

Children of the same family shall be kept together whenever possible unless it has been determined that this is not beneficial.

If two or more homes that are equally suitable for the child are considered, priority shall be given in order of filing of application. When the agency has offered a particular child to adopting parents and after discussion of all factors the adopting parents reach a decision to not accept the child, the agency shall make it clear that further consideration for another child will be given.

The agency shall maintain a list of approved homes sufficiently large to provide a wide basis of choice in selecting the home which will best meet the needs of the individual child.

B. Placement shall be based on the following:

1. All necessary relinquishments have been obtained and filed with the State Department of Social Welfare.
2. It has been determined by proper tests and examinations that the child is adoptable, and the study of the child has been completed. A thorough study of the prospective adoptive parents has been completed and the application has been approved.

Preparation of the child for placement. (See Sec. 2530-00)

Preparation of the adoptive parents for placement. Complete information concerning the health, mentality, personality, talents and social background of the natural parents and the results of the study of the child shall be given to the adoptive parents. Identifying information such as names of natural parents need not be given. (See Sec. 2550-00)

(Section Continued on Next Page)

2490-00 (Continued)

The State Department of Social Welfare will maintain a central file of applications and of approved homes in order to: (1) avoid duplication of investigation of applicants moving from one county to another and to provide state-wide information obtained in investigation by all agencies; (2) give the agency the benefit of information already on file in the State Department of Social Welfare regarding previous applications or petitions for adoption; and (3) provide an active list of approved homes which can be used for children who for some particular reason should not be placed in their own county.

B. Investigation of Independent Adoptions

The agency shall have responsibility for the investigation of independent adoption petitions filed in that county and referred by the State Department of Social Welfare, and shall give reciprocal service on adoption cases to the State Department of Social Welfare or other county adoption agencies.

2480-00 (Continued)

2480-00

5. Notification of placement which shall show the name of the child placed, date of placement, and the names of the couple with whom child is placed;
6. Copy of court report;
7. In all cases where application for service to children does not result in adoption the agency shall submit face sheet and history to the State Department of Social Welfare.

B. Statistical Reports

The agency shall furnish such statistical information and reports as the State Department of Social Welfare shall require.

C. Acknowledgment by State Department of Social Welfare of Material Submitted

Upon receipt of the case material submitted to it the State Department of Social Welfare will review the material and if necessary request the agency to furnish additional information. If the material is satisfactory, the State Department of Social Welfare will:

1. Acknowledge receipt of relinquishment and supporting material;
2. Acknowledge receipt of face sheet material on application;
3. Acknowledge receipt of home study;
4. Acknowledge receipt of court report and upon receipt of notification of filing of petition issue the department waiver and approval.

2490-00

REQUIREMENTS APPLICABLE TO COUNTY ADOPTION AGENCIES ONLY

2490-00

A. Placement of Relinquished Children

The county agency shall accept for service in the adoption program only children living in the county of application at the time of requesting service.

Ordinarily the agency shall place children relinquished to it only in approved homes in that county, but under certain circumstances it may be desirable for the child to be placed in another county or area of the state. In those instances placement may be arranged through a state-wide adoption agency or another county adoption agency. These cases shall be cleared through the State Department of Social Welfare.

The county agency shall accept applications only from individuals who are residents in that particular county.

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CASE WORK IN CHILD PLACING

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gives his child to the agency for placement.

The degree of readiness of parents to do this may range from one of being relatively sure and comfortable about the need and plan for placement, to varying degrees of ambivalence, conflict, and guilt. There may be complete rejection of the child by insistence that the agency take over responsibility completely with no giving of the parent himself in participation in planning, or there may be a blind turning to the agency because no other way of providing for the child was apparent at the time.

Process of Helping the Parent - At this stage the parent is not yet aware of what placement of his child really involves, nor is he yet aware of the conditions under which the agency will accept his child for placement. In helping the parent reach his decision it is necessary to consider with the parent what placement involves in order for him to determine whether placement is what it was first thought to be, whether placement will accomplish the relief that the parent thought it would, and what other unrecognized and unknown alternatives might exist. It is only as the parent experiences his own feelings regarding these things that the parent can participate and decide what he wants to do.

As the agency makes real the conditions and requirements which placement impose, the strengths and weaknesses of the parent's relationship to his child also emerge. Such things as agency intake policy, selection of foster home or institution by the agency, signed permission for medical care, cost of care and parental financial support, visiting regulations, etc., are all specific realities which help make the process real to the parent.

Normally a parent will struggle against turning over parental responsibilities to an agency. Parents experience guilt feelings, and wonder if friends, relatives, and community will think of them as bad parents; they will wonder whether they will lose their child's affection. Parents will want to know the answer to such questions as, will they see the foster home before the child goes there to live; why are foster parents interested in caring for other people's children; will they be able to get the child back; how often may they visit, etc. Nor are these feelings worked through when the parents have reached the decision to place the child. During placement these feelings continue. The giving over of a child is a gradual process, accomplished completely in adoption, and only partially in foster care placement. The manner in which the agency deals with these parental feelings determines the adequacy of the professional help extended by the agency. Pre-determined attitudes about parents who give up their children, punitive, judgmental, or depriving attitudes toward a parent who gives up his child or does not do so, are actions which limit the agency's help to the parent.

Study of Natural Parents - Content (Family History) - The study of the natural parent is geared to the agency's function of placing the child and the study will naturally begin with the problem presented by the parent at intake.

Factual information and such verification as proves necessary concerning family status, composition, ages, legal custody of child, health, educational status, economic status, relatives, housing, etc., must, of course, be obtained. The social history will also reflect the parents' ability and willingness to use agency services,

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2510-00 AGENCY RESPONSIBILITY TO PARENT AND CHILD

2510-00

The responsibilities of a child placing agency to the parent and the child are grave enough to require the highest degree of professional skill and understanding. Personal attitudes toward parental desertion and rejection, acceptance or lack of acceptance of the possibility that a child must sometimes leave his own home, and the ability or inability to bear the pain always present in even a skilled and responsible acceptance of a child from his own parents for placement, are feelings which must be professionally disciplined before adequate help can be extended to parents by an agency worker.

Furthermore, the help extended parents and children should be based upon a conviction of the parent's dignity as a human being. The manner in which help is extended must be characterized by an awareness of how each parent can take and use help, and how the agency's service can best be extended.

Work with each child, as the child is extended help in leaving his own home and helped to take on foster care, likewise requires professional skill and sensitivity. Though a child is helpless in many respects, each child has the right, and the ability in varying degree, for self-determination and individual growth at his own pace. There must, therefore, be a delicate awareness of the focus and the limits of the worker's responsibility toward the child. These concepts of agency responsibility must not only be a part of each worker's competence who deals directly with the agency's clients, but must be understood and accepted by agency administration.

The process of helping parents, whether married or unmarried, must be carried on with an awareness and use of the accepted essentials of professional case work, freedom from pressure, parent participation, and freedom of choice.

2520-00 NATURAL PARENT

2520-00

Initial Interview With Parent - The starting point of the placement process is the initial interview at intake and it is the parent, not the child, who is the focal point. This is true whether the agency offers services which are short-term or long-time boarding home placement, or whether its function is adoption care. The agency extends to the parent help in deciding whether foster care is wanted. Parent and agency each have responsibility in the placement process and successful placement of a child is built step by step by agency and parent together, and is possible only if the parent as well as the agency wants placement. The parent, whatever his failings, must receive consideration as a person in his own right, as an applicant for services who has the right to reject a plan which is not of his own making and choosing.

Psychologically, the parent who presents himself to the agency to apply for service has already made a first step. Many agencies recognize this by placing on the parent the responsibility for requesting the first appointment and whenever the parent is physically able, the parent initiates the process of placement by calling at the office of the agency. Thus it is the parent who initiates the process, not the agency.

Meaning of Foster Care to Parent - A parent in asking for and receiving help, in addition to working through the feelings which asking and receiving help may entail for him, is also faced with different and difficult relationships involving himself and his child. In placement, a parent emotionally as well as physically

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2530-00 (Continued)

2530-00

Successful work with children involves a high degree of professional skill, a skill based upon the conviction that children do understand a great deal of what happens to them, that even very young children are aware of the feelings of adults around them, that children do not forget easily, and that no adult can carry for the child the child's own responsibility. Even with infants this has been found to be true. Attempts to hurry over the process, to gloss over the reality of the situation, prevent the child from taking hold of the situation in his own manner, and take from him his responsibility as an individual. The kind of care and treatment the child receives at this time may seriously affect his entire future development.

The attempt to gloss over the situation leads inevitably to deception and disillusionment and such activity may lead to the establishment of a pattern of distrust of all adults.

It is essential that even the very young child who has a minimum amount of vocabulary be prepared step by step. Repetition of explanation of what actually will take place, tone of voice, allowance for acceptance of and respect for the child's negative reactions, are essential. For example, preparation for the first clinic visit may be a "dress rehearsal", prepared for by prior explanation of when it will occur, that the worker will take the child, where they will go, how the trip will be made, exactly what will happen when the doctor sees the child, why the doctor is seeing him, how the trip home will be made, etc. Such explanation of the first step and each succeeding step will serve to break the process into livable bits which the child can accept. The role of the worker is also explained to the child and is made clearer to him with each succeeding step of medical care, psychometric test, clothing purchase, trip to agency play room, etc. As these activities occur the child's ability to take on placement, or his inability to accept it, and his relationship to his parents, siblings, school, etc., become apparent to the agency for use in future planning of the child's care in terms of whether a plan for interim care is necessary, whether foster family care or group care might best serve the child's needs.

Placement of Infants - It has been recognized that separation from the mother is much more traumatic after six months of age than before. Actually, from birth on, a close relationship with a single mother person is essential. Therefore, when placement is necessary, all possible skill should be used to alleviate the effects of separation upon emotional development. With babies, provision for flexibility of individual schedules should be made. Babies should be allowed to regress to an earlier level of development until enough confidence is gained to again take up the process of growth. Authorities agree that this is not just indulgence but instead a far-sighted provision to insure a healthy emotional and physical development. What can be expected of a baby living comfortably at home with his own parents, secure in their affection, cannot be expected of a placed infant. Arbitrary weaning to coincide with need for placement may be accomplished at the expense of substitute gratifications demanded by the child later.

A baby's expression of tension and fear is limited to wordless language. With infants, this reaction may be expressed in thumb-sucking, increased masturbation, refusal to continue with weaning, refusal to take liquids, constipation, prolonged crying, head banging, crib rocking, extreme apprehension in presence of strangers, etc. Older children with only a limited vocabulary as well as children of all ages

(Section Continued on Next Page)

2520-00 (Continued)

its meaning for them, and what the parents are prepared to undertake to help their child.

The child can be considered only as a part of the family group and the needs and difficulties in his own family may be reflected in the child's ability to use a substitute for his own family.

Relinquishment - Parents should be permitted to sign relinquishments for adoption at the time the parent and the worker agree together that it is emotionally sound. Extension of time beyond the parents' point of readiness, or pressure to sign before the parent is ready, are both destructive in the casework process. Time as a case work tool is important only as proper use is made of it.

The worker need not play a passive role. If she is confident of her knowledge of the unconscious drives and conflicts of the parents, she may assume a dynamic part even to the point of placing time limits on the period for decision.

2530-00 THE CHILD

2530-00

During work with parents at intake, the study of the child also begins. As parents become involved with the requirements which placement imposes, the affectional relationships between parent and child become apparent. The study of the family and child does not, therefore, progress as an agency activity of probing for information but rather a joint agency and parent process in which each learns to know the other. Factual information and verification of parents' marital status, legal custody of the child, health situation, etc., are secured as they relate to agency functions and the requirements of placement. After the parent has made his decision about placement, the agency begins to focus more specifically on the child who is to be placed.

Helping the Child Into Placement - The preparation of the child for placement begins while decision for placement is being made. For the child old enough to understand language, placement begins with the parent's explanation to him of the decision the parent has made, the reasons for the plan, and the parent's giving of responsibility to the agency for providing for the child's care.

The agency may be required to sustain the parent in telling the child of the latter's decision, and in explaining the role of the agency worker. The parent may shrink from the child's inevitable reaction of fear, bewilderment and anger. It is of importance here as in all later steps of the placement process, including the ending phase of placement, that the child's feelings be allowed full expression, and be given acceptance, since the expression of feeling is the child's means of participation in the process. Just as the parent must reach a decision as to whether he can give his child for placement, the child must in turn be given freedom to move into placement at his own pace, with freedom to express and work through his feelings regarding it at each step of the process. The child finds some reassurance in the worker's understanding of his feelings, her understanding of his family status, her interest in his point of view, and the opportunity she gives him to know and participate in plans for his care. The worker's knowledge of his personality, his feelings, his behavior, and his needs later enables the agency to select the foster home which may be able to help him.

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2530-00 (Continued)

2530-00

Even a very young child who is about to move from a temporary home into an adoptive home can participate in the process. When study of the child has been completed, and a careful consideration of applicants has produced a home which seems to fit, the child is prepared for the change, and the change is made in steps. The worker assumes the responsibility for telling the child of the plan. Here, as before, the manner and tone in which this is conveyed are essential parts of the process. The process of moving into the second placement may be started by a trip to the agency play room with the worker, who devotes her full attention to the child. There may be a second trip if the child reveals great anxiety about the pending change.

The worker here serves as a stable and steadying force between the apprehensive child and the new foster parents who may be almost equally apprehensive. Though the child's fears and apprehension are reactivated, it is with the same skill and sensitivity with which the child was first helped to separate from his parent that the child is helped to venture from the known to the unknown in a manner in which he is free to move ahead under his own power. Unless the child is helped to do this, the child can very effectively refuse to be placed. A baby can refuse to be nourished in a situation which he cannot or does not accept.

Agency Responsibility Toward Child in Need of Therapy - While the majority of children accepted for foster care are able to make constructive use of placement, sometimes the problems which children bring with them into placement, which are magnified by placement, or which are brought to the fore in the stress of placement for the first time, may require help which is beyond the scope of the agency's regular staff to give. The agency, therefore, has a responsibility for early recognition of the special needs of these children, and for providing them with the help a child guidance clinic or psychiatric clinic can give. The need for such special help is evidenced as the agency worker goes with the child in the everyday agency procedures of clinic trips, clothing purchases, introduction to his new foster home, etc. The child's reactions of natural fearfulness, the nature of aggressive behavior, or his withdrawal, are clues as to whether special treatment might be necessary.

Relationship of Agency to Parent After Placement - Except in situations where the child's home no longer exists, the agency's relationship with the parent after placement continues to focus on the parent-child relationship. Case work service to children in foster care is not the ultimate solution to the problem, since children belong and need to belong to their parents. After placement, a relationship with the parent is maintained which continues to leave him responsible for having placed his child, and places on him responsibility for choosing when he can take back the responsibility he asked the agency to share.

If, with agency help, the parent can neither assume his responsibility nor relinquish it, the placement agency can render him no further service as a child placement agency. Termination of agency service may result in a recognition by the parent of his need for another type of help and he may have sufficient strength to seek other help.

2540-00 FOSTER HOMES

2540-00

Recruitment and Study - In a child placement program, the foster home is the service which the agency extends to the child, and home finding is a vital point

(Section Continued On Next Page)

2530-00 (Continued)

2530-00

express themselves in a language of behavior.

Interim Care - Interim care is temporary care provided by the agency for the child pending more permanent plans. Interim care may be due to the agency's need to study the child further, a need for a facility more adaptable than the regular foster home or institution where the child can fully express his feelings about separation from his parents and relation to an agency and a worker, or it may be provided because of parents' need for a transitional placement experience. A temporary home for his child for a limited period may enable him to learn what placement is like and whether it is what he wants and can use.

The agency may use temporary care to build up children physically, or as a study home. A baby usually requires placement in a temporary home until the agency learns to know him as a definite personality in order to place him with a family which is not only able to fill his needs but in which the baby is able to fill theirs.

The use of a temporary home serves as a beginning and partial experience with placement which also serves to provide a basis for determining the type of home an older child will require. An evaluation of the child's use of this experience enables the agency to help in the child's eventual adjustment to a permanent home.

In temporary placement, the parent learns at first hand what placement does to him in terms of the feelings and attitudes of his child, and in terms of visiting schedules and the inclusion of a set of foster parents in the situation. The ending of the phase of temporary placement may also terminate the parents' need for agency service.

Interim Home - The foster mother in the temporary home is chosen because of her interest and ability in doing the job of helping children get used to being away from home. She has less need to absorb the child, she can allow the child to establish a tie with the worker who may assume a much more active role with the child in the temporary home than in the more permanent home. The foster mother is able to live through the behavior problems of temper tantrums, bed wetting, etc., through which the child may be expressing his feelings of pain, rejection, and resentment at separation from his parents. The foster mother may be more able to live with a very disturbed and difficult child with the agency's help because it is for a limited period.

Relationship of Agency to Child After Placement

Supervision in Interim Home - During interim placement, the worker assumes an active role in working with the child. Visits at weekly or bi-weekly intervals, to see the foster mother and child together, or the foster mother alone, or to take the child on trips to clinic, agency play room, occur.

Preparation for Movement into Permanent Care or Termination of Agency Service - As with initial preparation of the child for placement, preparation for the next step, whether it is movement into a permanent foster home, adoptive home, or return to his own parents, must be just as carefully done and with the same attention to each step at the pace with which the child can carry it on.

(Section Continued On Next Page)

2540-00 (Continued)

2540-00

Although foster parents may have reared their own children successfully, they do not know or understand the complicated factors affecting the feeling of a child who has lost his own home, whose parents may have failed him, and who consequently feels he cannot trust any adult. A two-way relationship with the agency worker is necessary while the worker learns how the foster parents intuitively deal with behavior problems, and they in turn receive from the worker the professional guidance she can give, as well as information concerning the background and needs of the child under care.

There are times when foster parents can sustain the process of caring for a child with difficult behavior problems only with a good deal of agency help. In situations where the child is also receiving assistance from a child guidance clinic or psychiatric clinic, the agency has an important function of interpreting to the foster parents behavior which they could otherwise not accept.

As a child leaves his foster home to return to his own parents, or for placement in an adoptive home, the agency may likewise need to help sustain the foster parent during the inevitable pain of such separation.

2550-00 ADOPTIVE HOMES

2550-00

The agency should offer to applicants for children for adoption the same quality of consideration and acceptance which casework stresses as its first service to any client. The agency should focus its interest on the applicant, rather than emphasizing the oversupply of good adoption homes. The agency representative interviewing the applicant should be objective and will necessarily appraise the applicants but should not overlook the value to the applicant and to the agency in the acceptance of its function in the community by the expression of warmth and understanding of the applicant.

"... community acceptance is assured in the long run if people seeking the service of an adoption agency find there three things - recognition of their particular problem, appreciation of their individual integrity, and the opportunity for constructive relationship which they can use in working toward a satisfactory solution." (Adoption as the Community Sees It, by Mary F. Smith, in Social Case Work with Children, edited by Jessie Tart (Vol. 3, No. 1, of the Journal of Social Work Process). Philadelphia, Pennsylvania School of Social Work, 1939)

"Perhaps the crucial criterion is the ability of the parents to see in the child something more than a satisfaction of their own needs; the ability to recognize in the child a separate personality, with needs of its own. While some desire to relive through the child is perhaps usually present in, and normal to, parent-child relationships, prospective adoptive parents who give the clear and immediate evidence of a predominant desire to work out their own thwarted ambitions through a child should be considered unfit. On the other hand, a degree of parental pride in the achievements and accomplishments of a child is natural and desirable. It is, therefore, advisable, so far as possible, to place children with parents who will value the degree of achievement of which the children are capable.

"The recognition of motives is often not easy. Prospective adoptive parents may not recognize their own motives in seeking a child, or, recognizing them,

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2540-00 (Continued)

2540-00

in the agency's function. The applicant who comes to a child placing agency for a child to care for has a need, and the home finding process is pointed towards discovering whether the purpose of the agency and that of the prospective foster parent can be joined in discharging the agency's function.

The agency's concern is whether the applicant will be able to accept and work with the conditions set up by the agency. The agency structure and function become the basic factor which the worker brings to the applicant in realistic terms which are understandable.

The home finding process is a lengthy one involving office visits, health clearances, several home calls, and acquaintance with all the members of the foster family, before a decision is reached that the home may be tried. The length of this process and the fact that the applicant does not know whether she will be accepted or her home rejected calls for skill and sensitivity on the part of the worker. Every condition which the agency sets up is, however, in terms of the needs of the child to be cared for. Such realities as board rate, clothing allowance, medical care, visiting of own parents, and other specifics of agency policy are the basic issues in which applicant and agency become involved. Around these, the applicant must determine whether she can go along with the agency. The manner in which she reacts to these conditions and to the worker who makes these conditions real to her are significant in the agency's decision as to whether her home can be accepted. Any change on the part of the applicant to meet the conditions imposed by agency functions is not, therefore, imposed upon her but is self-determined and stimulated by agency function. Experience has indicated that recruitment through relatives, friends, or neighbors who have been active foster mothers is the most fruitful source of applicants. Other recruitment methods may result in a flood of applications out of which the number of homes secured is frequently disappointingly small.

Rejection and Withdrawal - Rejection of a home or withdrawal by the applicant prior to the initiation of this lengthy study process may occur on the basis of such factors as hazards to health and safety, lack of sleeping quarters, incomplete family, etc.

Agency Relationship With Foster Parents - When a usable home is found, it is just the beginning of a continuing relationship between the agency and the home characterized by understanding, skill, and patience in maintaining and sustaining the foster parents in the difficult process of caring for someone else's children.

Much of the child's needs are met by the foster family, and in most instances the child is helped best by helping the foster parents understand him. The agency, however, continues to be of importance to the child until his foster parents become permanently responsible for him by reason of adoption, or he returns to his own family, or he reaches independence. The worker may help the child in his adjustment to the foster family, new school, or community.

Just as the homefinding process began to prepare the foster parents for the realities of working with an agency, for the necessity of acceptance of own parents, for the sharing of the child with the agency, etc., the continuing relationship of the agency with the foster parents focuses on the needs of the child and the agency's function.

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The following quotations from the article "Placing the Child for Adoption," by Florence Clothier, reproduced by Children's Bureau, U.S. Department of Labor, with permission of Mental Hygiene, discusses the evaluation of the adoptive home and placement for adoption.

"No less difficult than the evaluation of the child is the evaluation of the prospective adoptive parents. This ¹ points out that "after suitability as to usual standards of good character and living conditions have been established, there will be subtler elements for consideration. . . Subjective, as well as objective factors in the home must be understood. . . The crux of good adoption work probably lies in the adoption worker's ability to give wise and imaginative assistance in the selection of the right home for the child who can accept placement."

"The prospective adoptive parent comes to a social agency as a client in need of help. Whatever his motive may be, he is taking what is, for him, a big and important step which will modify his entire future life. The step he contemplates is one that he thinks will bring him deep satisfactions. From his point of view, the application to adopt a baby has been carefully considered. The action he is taking has usually followed a long period of thought and discussion with relatives, neighbors, or family advisers--i.e., doctors, lawyers, or ministers. To many who apply for a baby, the role of client of a social agency is not easy.² A barrier of reticence and shame must often be overcome before a prospective adoptive parent can put himself in the hands of a social worker. Initial self-consciousness, with its accompanying tension or defenses against anxiety, must be recognized by the social worker. Sometimes the adoptive parent may cover his anxiety by expressions of an altruistic wish to be of service to neglected childhood. It is the responsibility of the skilled social worker to understand and to evaluate not only the superficial motives that the adoptive parents present, but also the deep, underlying needs that have driven them to attempt to work out their inner dissatisfactions through the adoption of a baby.

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¹ See Social Aspects of Adoption, by Sophie Van S. Theis. New York: Child Welfare League of America, 1937

² See "Adoption as the Community Sees It," by Mary F. Smith, in Social Case-Work with Children, edited by Jess Taft. (Vol 3, No. 1, of the Journal of Social Work Process). Philadelphia: Pennsylvania School of Social Work, 1939.

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2550-00

they may seek to conceal them. To estimate motives requires an adequate acquaintance with the prospective parents to sense the goals, values, and frustrations that determine their attitudes and color their lives. . . Of particular importance is the type of family organization in which each of the prospective parents grew up and the attitude he held toward his own parents."¹

"Having determined what children are eligible for adoption in some home, and what homes are capable of rearing some child, the social worker faces the responsibility of deciding what child to recommend to what particular adoptive parents. As the child grows up and approaches maturity, it will be easier for him and for the adoptive parents if his appearance and constitutional type are not too foreign to that of the family of which he is a part. The racial antecedents of the child and of the adoptive parents should be the same or as like as possible. Physical characteristics of the true mother and father should be borne in mind when adoptive parents are being considered for a child. In a general way, the temperaments of the child's true parents should not be in complete contradiction to the temperaments of the adoptive parents. But temperaments cannot be measured, and the social worker's sensitivity and intuition must guide her evaluation of them."

". . . there can be no question but that all the pertinent facts concerning the child's true family history, his birth and medical history, and his personal history (if he is not a new-born infant) should be recorded and filed by the agency as a valuable private document. It is also the obligation of the social worker always to tell prospective adoptive parents of any pathological condition in the child's family history that is suspected of having a strong genetic basis--i.e., psychosis with no organic basis, familial feeble-mindedness, or epilepsy. It is also mandatory to give adoptive parents free access to full knowledge concerning the child's medical history. If a child of pre-school age is retarded in development, adoptive parents should know it, but without the label of an I.Q. A single psychological examination of a pre-school child whose environment has not been conducive to good intellectual development can be grossly misleading."

"The probationary period can serve as far more than a gross protection of the child and the adoptive parents. It can be a period of infinite value, both to the adoptive parents and to the social worker. During this time, the social worker should be helping to prepare the adoptive parents to deal with the inevitable problems that arise in the life of an adopted child."

¹ "Adoption Practices and the Physician", by R. L. Jenkins, Journal of the American Medical Association, Vol. 103, pp. 403-8, August 11, 1937

2560-00 (Continued)

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rule them out as suitable adoptive parents, but the social worker must be very sure that the adopted child does not come into the family merely as a pet for a lonely or spoiled only child. Where there are 'own children' the adopted child's situation is apt to be precarious by comparison.

"Elderly couples who have waited for years in the hope of having a child of their own, and who finally accept it as inevitable that they cannot, must be considered carefully before they are given a child. Their routine of a well-ordered life will be interrupted, and rigid personalities, traveling in deep grooves, cannot accept a rude upheaval with complacency. The cheerful, companionable, well-brought-up child of their phantasy may be very different from the noisy, untidy, often cantankerous, ungrateful, flesh-and-blood hoodlum who manages always to be underfoot. On the other hand, elderly couples who have longed for many years for a baby may, when they receive one, cling to it as an infant. They may limit its capacity for development by an oversolicitous, overprotective attitude."

2560-00 (Continued)

2560-00

"After ruling out obviously inadequate prospective adoptive parents, there are no rule-of-thumb methods that the social worker can use to judge the suitability of a home for receiving an adoptive child. Physical fitness, absence of gross mental disease, some measure of economic security, and an adequate social and community adjustment are essential, but they offer only minimal protection to the child. Adoptive parents whose fitness on the scores listed above cannot be questioned may apply for a child for grossly improper motives, concealed behind a honeyed love of children. Such a motive may be connected with the inheritance of property or the fulfilling of the conditions of a will. This sort of client rarely comes to the attention of social workers, preferring the anonymity of nonprofessional agencies.

"Other clients with motives that make them unsuitable for the responsibility of a child are those who apply for a baby as a last resort in the effort to patch up a crumbling marriage. Occasionally prospective parents apply for a baby because they think. . . that the responsibility of a baby would be the best treatment for a wife's 'nervousness.'

After initial rapport has been established with the client who applies to adopt a baby, the gross fitness of the home and the superficial suitability of the adoptive parents can readily be established by social investigation. This investigation, as it proceeds, should bring to light any serious personality defects in the prospective parents and any evidences of marital incompatibility that, with the passing of time, might threaten the child's security. Before placing a baby, the social worker will want to be sure that all members of the child's future immediate family will welcome his admission to the family unit - especially that both the husband and wife want him.

"The social worker must be able to determine whether the prospective parents are really interested in the child they plan to adopt or whether their interests are exclusively and permanently focused on a beloved child whom they have lost and whose place they are trying to fill. Some clients apply for a child in order that a child of their own may have company. This motive does not necessarily

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2605-00

B. Clearances

Clearances shall be made as soon as possible after the case is received, and subsequent clearances shall be requested as indicated. Clearances shall be in the names of the petitioners, the natural parents, her parents, if indicated, and the child.

The district office or the agency will make the clearance through the Exchange in its district, which will clear with its own records and those of any other city in this State which the district or agency may request, or in any city in the United States which is a member of the National Social Service Exchange Organization.

The clearance slip shall contain the following information: case number, as much identifying information as possible, including birth dates, full names, any aliases, present address, and at least one previous address, if known. If the natural mother is unmarried, she should be listed as the client, and the natural father's name should appear under other persons for whom clearance is indicated.

Notation should be made on the bottom of the slip when clearance in some other city is desired.

C. Review of Records of Other Agencies

Clearances with the agencies with which the parties are registered may be made in person, by telephone, or by letter, according to the working agreement with the particular agency. It may not be necessary to review the records of all agencies, but essential records shall be reviewed as promptly as possible.

If the agency is in another district, request for information or a resume of the record may be made to the agency by letter by the district or agency handling the case, or the first district or agency may request the other district office or agency to review the record. When such a request is made, the requesting district or agency shall include a full report of registrations with agencies in the second district.

If the agency is in another state, the request for information or for a resume of the record shall be made by letter.

A. From Natural Parents

Authorizations shall be obtained from the parent or parents at the first interview;

1. For the release of medical and social information (Form Adop M52)
2. For release of medical and social information by physician (Form Adop M49)
3. For release of medical information by Veterans' Administration if the parent is a veteran holding a medical discharge (Vet. Admn. Form 3288)
4. To petitioners to provide medical or surgical care, including anesthetics for the child pending adoption (Form Adop M65). Two copies of the form should be signed and both should be sent immediately to the petitioners. The narrative and correspondence should show that the authorization has been signed and transmitted to the petitioners.

B. From Petitioners

Authorizations shall be obtained from the petitioners:

1. For employment verification (Form Adop M21)
2. For report from child's physician (Form Adop M15)
3. For report from petitioners' physician (Form Adop M26)
4. For release of medical and social information by hospital, clinic, or social agency (Form Adop M51)
5. For release of medical information by Veterans' Administration if the petitioner is a veteran holding a medical discharge. (Vet. Admn. Form 3288)

The authorizations and the questionnaire (Form Ad9-Rev) regarding the petitioners and the child shall be mailed or taken to the petitioners immediately after the petition is received.

A. Registration

Registration shall be made with the Social Service Exchange, if any, in the county in which the petition is filed in the names of the petitioners or applicants, the parents, and the child. If the natural mother is not married to the natural father, his name and that of her parents shall appear under "others."

(Section Continued on Next Page)

2620-00 (Continued)

2620-00

If the natural father claims to have adopted the child under Sec. 230, but is willing to give his consent to the adoption, consents may be taken from both parents on the joint custody form. If he is unwilling to consent, the investigation and report should cover thoroughly all five points listed in the section, which would include an interview with the wife of the natural father, if he is married, and probably interviews with other members of his family. While refusal on his part to allow his wife to be interviewed would be indicative of his failure to meet all conditions, it should not be considered conclusive evidence of the fact. The agent should get as much information as possible and report all the facts to the court. In such an instance the agent would proceed on the basis of consent signed by the natural mother only.

2625-00 MARRIAGE AND DISSOLUTION OF MARRIAGE

2625-00

Marriage and dissolutions of marriage shall be verified as follows:

A. Natural Parents

1. Marriage record of parent or parents at time of child's birth
2. Record of previous marriage of either parent, and subsequent deaths or divorces of spouse in each case
3. Record of subsequent marriages of mother and record of termination of marriage.

B. Petitioners or Applicants

1. Marriage records of both;
2. Record of any previous marriage of either;
3. Record of divorce, annulments, or death of the spouse in each previous marriage of either.

2630-00 IDENTIFICATION

2630-00

Proof of identity of the parents shall be requested where indicated.

2635-00 EMPLOYMENT

2635-00

Applicants' or petitioners' current employment shall be verified either by correspondence with the employer (Authorization Form Adop M21 and Verification Form Adop M29), or through satisfactory verifications in the possession of the petitioner or applicant. If the current employment has been for less than a year the last previous employment should also be verified.

2610-00 DOCUMENTARY EVIDENCE - ORDER OF PREFERENCE

2610-00

1. A certified copy of the document (certified to by the proper officer in whose custody the records are kept);
2. A certified photostatic copy of the document;
3. The original document upon which appears the notation by the proper authority that it has been recorded in the proper public file;
4. Letter or form from the proper official in whose custody the records are kept stating that the document is recorded;
5. Original document not marked;
6. Photostat of original document not marked recorded.

2615-00 BIRTH

2615-00

If the child's birth has been registered, the birth certificate, or a copy thereof, should be obtained. If the birth was not registered within one year after birth, other verification of the identity of the child may be accepted in lieu of the birth certificate, such as a baptismal certificate, hospital records, other documentary evidence, or affidavits of persons having knowledge of the time and place of the child's birth.

2620-00 LEGAL STATUS OF CHILD

2620-00

Complete information regarding the legal status of the child shall be obtained to show whether the child is legitimate, illegitimate, orphan, half-orphan, left without means of identification, declared free from custody and control of his parent or parents, or a child having a legal guardian of his person and/or estate.

When a child has been abandoned without provision for its identification, abandonment proceedings under Section 701 of the Welfare and Institutions Code will not be necessary if there has been compliance with the provisions of the Health and Safety Code and a certificate of finding has been issued, or if the child has been declared a foundling by Juvenile Court action.

If there is any doubt as to the status of the child, however, either by reason of the circumstances of the finding, or if it appears that sufficient effort has not been made to establish its identity an adjudication of abandonment shall be required. (AGO NS5322)

In connection with the adoption of every illegitimate child, consideration shall be given to the question of whether there has been an adoption under Sec. 230, Civil Code. (See Sec. 2070-00)

If there is an indication that the child may have been legitimated under Sec. 230, or if the alleged father claims joint custody, he should be interviewed. If, during the interview, he says that he has not adopted the child, nor acknowledged it as his own publicly, a report of his statement may be included in the court report to show that he does not have joint custody and that his consent is not necessary.

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2655-00 ACCEPTABLE MEDICAL REPORTS

2655-00

Medical reports for the child and the petitioners or applicants shall be completed by a doctor who is licensed as a physician and surgeon under Chapter V of Division 2 of the Business and Professions Code. (This relates to physicians possessing M.D. degrees and those possessing D.O. degrees who have a physician's and surgeon's certificate.) If necessary, clearance on any individual physician may be made with the Board of Medical Examiners or the Board of Osteopathic Examiners.

2660-00 HEALTH

2660-00

A. Petitioners in Independent Adoptions

A medical report of an examination of each petitioner, made within six months of the filing of the petition, shall be obtained. If a further examination is indicated, it shall be requested. (Authorization Form Adop M26 and Physician's Report Form Adop M35)

The medical report must include a report on a blood test for syphilis. If the blood test is positive the matter shall be cleared with the physician immediately to determine what the prognosis is. If the petitioner is under treatment, the prognosis is favorable, and the physician states that the condition is not infectious, the agent may request an extension of time. At the same time she should explain to the petitioners, the physician and attorney that the State Department of Social Welfare, acting on the advice of the State Department of Public Health, Bureau of Venereal Diseases, will require a spinal fluid examination and a careful physical examination to determine the presence or absence of other manifestations of syphilis before making a final recommendation in the adoption. In doubtful cases material may be submitted for advice to the Bureau of Venereal Diseases and information of the State Department of Public Health.

Medical reports on other members of the family or household should not be requested routinely but only as indicated. In such cases a statement by the physician rather than a complete medical report will usually be sufficient.

B. Applicants in Agency Adoptions (Relinquishment)

A medical report of an examination of each applicant shall be required during the course of the study of the home. If a child is not placed within six months, a second examination shall be required before a placement is made.

The requirements outlined above regarding blood tests for syphilis and medical reports for other members of the household apply also to applicants in an agency adoption.

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VERIFICATIONS

2640-00 REFERENCES

2650-00

2640-00

A. Parents

References: The natural parents may be asked for references from either friends or relatives who know of the proposed adoption and would be able to give information regarding them and their families. If the references are available they should be interviewed if possible.

B. Applicants or Petitioners

References: Opinions of persons given as references by the petitioners or applicants shall be obtained either through personal interviews or by correspondence (Form Ad 10). If any reference expresses an adverse opinion, he should be interviewed personally if residing in this State. Ordinarily there should be at least four references, not including the doctor and attorney, but in questionable cases additional references may be required and interviewed personally. It is suggested that (a) at least one reference be from the minister or someone who knows the petitioners or applicants in their church relationship, if any; (b) at least one reference from a business associate, other than the employer; (c) at least two from friends (preferably married couples) who have knowledge of their home life and relationships and standing in the community.

2645-00 CRIMINAL OR POLICE RECORDS

2645-00

If there is any indication that a parent, an applicant, or a petitioner may have had a police or criminal record, there should be clearance with the local police department and with the Division of Criminal Identification (Form Adop M61).

2650-00 INCOME

2650-00

Income and ownership of real and personal property by applicants or petitioners should be verified, since their ability to care for a child adequately and to provide financial security for him are important factors in determining their suitability as parents.

Income from self-employment or from sources other than employment may be verified by income tax returns or other financial records. It is not necessary to verify every item of income, nor to check records in the county clerk's office on real property. Sufficient information can easily be obtained from income tax returns, deeds, records of loans, county tax receipts, bank books, insurance policies in the petitioners' or applicants' possession. The authoritarian approach should not be used in verifying finances. Petitioners or applicants should be encouraged to give to the agency any information on their finances which would support a recommendation of approval of their home.

Information regarding outstanding obligations and debts should be obtained and verified if circumstances indicate. Information may be obtained by requesting credit rating if necessary.

2660-00 (Continued)

2660-00

adoption agency or private child placing agency should be sent to the Adoption Bureau of the State Department of Social Welfare for referral to the State Department of Public Health.

E. The Child Placed By an Adoption Agency

In addition to the above information regarding medical requirements (see Sec. 2430-00)

2665-00 TESTS FOR SYPHILIS

2665-00

In making the requirement that there shall be a blood test for syphilis on the child, the Department is acting on the advice of the Bureau of Venereal Diseases of the State Department of Public Health. It recognizes that there are differences of opinion among physicians regarding the necessity for such tests, that they are often difficult to obtain, and that there may be opposition to the requirement on the part of the attending physician and the petitioners.

The Bureau of Venereal Diseases states that it is not difficult to secure a specimen of blood, even in the case of a very young infant, and has issued mimeographed instructions for securing a specimen and for the diagnosis of congenital syphilis. Physicians who have occasion only frequently to obtain blood specimens on children may not be as skillful as others and may be reluctant to do this type of test, but pediatricians, laboratory technicians, or physicians attached to health departments who are in a position to maintain their skill in this area will not hesitate to take a blood specimen on a small infant or young child.

Should the attending physician be unwilling to do the test, the petitioners may request that he refer them to a private laboratory, or the petitioners may go to any full-time health department to obtain the test. The agent might point out these two possibilities to the petitioners. If such action seems indicated, it will be advisable first to inform the physician that the serological on the child is a mandatory requirement of the Department. Should the physician still be unwilling to do the test, the agent may then suggest to petitioners the other possibilities. In such situations, it is important that the physician-patient relationship be protected, since the physician will have continuing responsibility in the care of the child.

A serological test on blood taken from the cord at birth is not a highly valuable test. Blood taken from the vein of the mother at time of delivery should give the same results as the cord test and is considered the preferable means of obtaining the specimen.

It is entirely possible, in a very small percentage of cases, for a child to have syphilis even though blood tests taken on the mother during pregnancy and at the time of delivery are negative. For example: A mother may be exposed to infectious syphilis a month before delivery and have a primary syphilis lesion on the genitalia at the time of delivery before the blood test of the mother or child turns positive. In a case of this kind, the child may develop either congenital or acquired syphilis but the blood test of the mother and child could both be negative at the time of birth but turn positive shortly thereafter.

(Section Continued on Next Page)

2660-00 (Continued)

2660-00

C. Natural Parents of Child to be Adopted

Health: As much information as possible should be obtained regarding the health of the natural parents, from their own statements, from medical reports if available, from records of agencies, clinics, hospitals, maternity homes and from relatives and other references.

When the child to be adopted is an infant, a report should be obtained from the obstetrician regarding the mother's health and physical condition, including a blood test for syphilis, and a statement regarding any complications of pregnancy and birth. (Form Adop M39) If the child to be adopted is older, a similar report should be obtained if it is deemed necessary.

D. The Child Placed Independently

The agent shall obtain reports from the physician attending the birth of the child (in all cases of infants and as deemed advisable in cases of older children) concerning complications of pregnancy and birth, condition of the child, and reports of tests and examinations. (Form Adop M39 Rev.)

The agent shall obtain a report from the pediatrician, hospital, clinic, or other physician currently attending the child. (Form Adop M36 Rev.) In the case of an infant, the report should be on an examination made when the child is at least five months of age, the report to include a blood test for syphilis.

An exception may be made and a blood test need not be required on the child if there is a record of one negative blood test on the mother taken during pregnancy or on the mother or child at the time of delivery, and provided social history on the mother indicates that she has not been promiscuous.

Authorizations should be obtained from the mother for release of medical and social information. (Forms Adop M49 and Adop M52) If the request for information is sent to a hospital or maternity home it should cover both types of information. In requesting information, complete identifying information should be given: the name of the natural mother, the name and birth date of the child as it appears on the birth certificate, and the name of the natural father, if known. If the child was born in a maternity home the request should be directed to the home rather than to the physician.

If it is not possible to get a report from the hospital, maternity home, or physician attending the mother at the birth of the child, and the birth certificate shows that a blood test was made on the mother during gestation, or at delivery, the result of the test, if positive, may be obtained from the State Department of Public Health, Bureau of Venereal Diseases, San Francisco, California. The request for this information should be made by the district concerned. Request from a county

(Section Continued on Next Page)

The State Department of Public Health will give consultation service to the State Department of Social Welfare on cases involving difficult medical problems.

A. Procedure for the Adoption Units in the district offices of the SDSW:

If the district office is undecided as to what recommendation is indicated on a case in which there is a question of a syphilitic condition, the Bureau of Venereal Diseases will give advice if complete reports are submitted to the Bureau. These should be sent by the district to the appropriate branch office of the State Department of Public Health. The reports submitted should include quantitative blood test findings, and a complete laboratory report of the spinal fluid test (e.g., cell count, total protein determination, and colloidal gold curve).

If the district office is unable to reach a decision on a case in which the medical report received on the child or petitioner indicates the presence of serious medical problems (such as tuberculosis, multiple sclerosis, diabetes, etc.), it may ask the advice of the State Department of Public Health. If the case is one where tuberculosis appears, it may be discussed with the branch office of the Bureau of Tuberculosis. Other types of medical problems should be sent to the Bureau of Adoptions in Sacramento for referral to the Bureau of Maternal and Child Health for advice.

It will be necessary to submit complete medical information before the Department of Health can give their appraisal of the medical situation. The Bureau of Tuberculosis requests that they receive the x-ray film in each case involving tuberculosis. Either the patient or the agent, with the permission of the patient, should, therefore, request the private physician to send the x-rays to the Department of Health, Bureau of Tuberculosis. It should be made clear to the physician, however, that this is being requested only for the purpose of evaluating the medical situation in terms of its effect on the Department's recommendation on the adoption and that the Bureau of Tuberculosis is the Department's source of advice. Since it is not possible to make a general statement as to the type of medical information the Department of Health's physicians will need in other types of illnesses, these situations should be handled on an individual case basis.

B. Procedure for county adoption agencies or private child placing agencies will be as follows:

The agency may submit medical problems on which it wishes advice to the Bureau of Adoptions, State Department of Social Welfare, for referral to the State Department of Public Health reports as described above.

2665-00 (Continued)

2665-00

If a blood test on a child at birth is positive but the child appears to be well, a second test should be made at one month. If this is positive, the chances are that the child has syphilis but if the child is clinically well, treatment should not be started until the results of a series of tests are known. If subsequent tests are negative, the child should be checked several times during the first two years of life, that is, at one, two, three, six, twelve and twenty-four months. The Bureau of Venereal Diseases advises that treatment should not be started when only one positive serological report has been obtained on the infant,

The diagnosis of congenital syphilis should not be accepted as conclusive unless a series of tests have been made, and treatment should never be started until a definite diagnosis is made. It is possible that a positive laboratory finding on a child may not mean that the child has congenital syphilis and if treatment is started on the basis of only one positive laboratory finding it will never be possible to prove that the child does or does not have syphilis. Such cases can be referred to the Bureau of Venereal Diseases for further advice as to action to be taken by the Department.

In any case where the results of tests of the mother and child at time of delivery are different, further tests should be carried out to determine whether the child is actually infected before treatment is started.

If a child is found to have syphilis, the circumstances in the particular case will determine whether an extension of time shall be requested for further observation or medical study or whether a recommendation of denial shall be made.

The Bureau of Venereal Diseases advises that in all nonspecific or low titer reactions on blood tests for syphilis on adults or children (e.g., $\frac{1}{1}$, $\frac{1}{2}$, or $\frac{1}{3}$ findings on blood tests) a series of tests should be made every two weeks over a three months' period before the diagnosis of syphilis is actually established. There should also be a complete physical examination of the patient, including an examination of the eyes. Treatment should not be started until a series of blood tests have been done and it has been established with reasonable certainty that the disease is present. If treatment has been undertaken, the blood test will be negative following even a few treatments, and it will not be possible to determine whether the patient really has the disease.

In any case in which the petitioner, as a result of a test, is diagnosed as having syphilis he should have a spinal fluid examination and a careful physical examination to detect the presence or absence of other manifestations of syphilis. This is necessary regardless of the length of time he may have had the disease. The results of the spinal fluid examination and physical examination must be known before an evaluation can be made of the suitability of the petitioner as an adoptive parent. When the petitioner has had treatment for syphilis, a quantitative report of spinal fluid findings after the treatment has been administered and also a report of the general physical examination given after treatment should be requested to determine whether there has been any organic involvement which may affect the petitioner's general health in the future.

A spinal test should be done in those cases where treatment has been undertaken without a series of quantitative blood tests, and the original test shows non-specific reaction. If spinal fluid findings prove negative, there would be no obstacle to the adoption.

2690-00 (Continued)

2690-00

- C. Immigrant identification card issued between 7-1-28 and 8-27-40;
- D. Passport, endorsed by Immigration and Naturalization Service to show admission as quota or non-quota immigrant.
- E. Certificate of registry showing that the person who entered the United States prior to 6-30-24 without being in possession of an immigration visa and who has resided in this country continuously since then, or whose entry for some other reason cannot be verified, has had legal entry created for him as of the date of his entry.
- F. If none of the above are available, date and place of entry may be obtained and a letter requesting verification directed to Immigration and Naturalization Service at the port of entry.

If no proof of legal entry can be obtained, the petitioner should be advised to go to the nearest immigration office to clear his status and have his entry adjusted. There may or may not be a penalty attached to it.

2675-00 VETERANS' ADMINISTRATION, CLEARANCE WITH

2675-00

Clearance should be made with the Veterans' Administration on any applicant, petitioner, or natural parent who has a medical discharge. Permission should be requested to review the discharge papers of any who have been in military service. Medical discharges will be shown under Section A. R. 615-361, Disability - Physical or Mental.

Requests for medical reports on veterans accompanied by the authorization form (Veterans' Administration Form 3288) should be sent to the Regional Office in which the veteran's county of residence is located: San Francisco, 49 Fourth Street; Los Angeles, 1031 S. Broadway; San Diego, 325 B Street; and should be addressed to the Manager of the Regional Office marked "Attention Social Service." If the veteran is in the hospital at the time, clearance should be made with the hospital.

2680-00 PSYCHOMETRIC OR PSYCHIATRIC REPORTS

2680-00

Psychometric and/or psychiatric examinations shall be required when nothing is known regarding the background or parentage of a child, when background is questionable, or when there is a family history of feeblemindedness, insanity, epilepsy, mental illness or emotional instability.

Similar examinations shall be required of applicants or petitioners if indicated by the study.

2685-00 INSTITUTIONS - CLEARANCE WITH

2685-00

If it is learned through interview or investigation that a parent, an applicant, or a petitioner, or any member of the immediate family, is or has been confined in any public or private hospital for the mentally ill, or for narcotic or alcoholic treatment, complete information shall be obtained from the hospital or institution.

2690-00 CITIZENSHIP OR LEGAL ENTRY

2690-00

If an applicant or petitioner reports that he is foreign born, information regarding his citizenship shall be verified. If the petitioner is an alien or the child is an alien, his legal entry into the United States shall be verified.

Citizenship may be verified by reviewing citizenship papers in the petitioner's possession, in which event full information should be given in the narrative; or, if the petitioner does not have his papers, a letter from the clerk of a court having naturalization jurisdiction giving the information will be acceptable.

Legal entry into the United States may be verified by any of the following:

- A. Alien registration receipt card if it is endorsed by an official of the Alien Registration Division. The endorsement will appear across the face of the card and will show date and place of admission;
- B. Declaration of intention to become a citizen provided it was issued on or after March 2, 1929.

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INTRA-STATE AND INTER-STATE REQUESTS

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(b) Petitioners

The request shall include a brief statement of information already obtained regarding the petitioners. If the office making the request has no information, there shall be a statement to that effect and a request for a complete report according to outline.

The requesting office shall indicate whether the natural parent has been interviewed and consents obtained, and any information regarding the child which would be helpful to the interviewer or which should be discussed with the petitioners.

(c) Collateral Calls

The request should specify the particular points to be cleared and indicate any other information which would be desirable.

If, after making a request, the requesting district or agency finds that the interview is no longer necessary, it should immediately notify the second district or agency.

B. Reply

1. An attempt should be made to clear the request at the earliest possible moment. If the second district or agency writes to the interviewee requesting a conference, a copy of the letter should go to the requesting district or agency. If there is an unusual delay, the second district or agency shall notify the requesting district or agency.
2. The report back to the requesting office should be in narrative report form according to outline (for petitioners or natural parents) and should be sent with a covering memo of transmittal.

When the request is for specific information only, the point in question should be fully covered, and any other information pertinent to the adoption which may have been obtained should be included. The report should be in outline form even though it may cover only a partial investigation.

2710-00 REQUESTS FOR SERVICE ON INDEPENDENT ADOPTIONS

2710-00

A. Request

When one district office or agency requests another office or an agency in another state to interview a natural parent or petitioner or to make a collateral call, the request should include the following basic information and should be set up according to the following outline:

1. Due date of petition; if urgency mark "urgent" and specify date needed;
2. Tabulate the names and addresses of the individual or individuals to be interviewed and give any other information which might be helpful to the person taking the interview, such as directions for reaching the home, when interviewee may be seen, and whether an office interview will be acceptable.

(a) Natural Parents

If the requesting office has obtained partial information, statement should be made of the points already cleared, and the request should specifically stipulate the points to be cleared or emphasized. If no contact has been had, request should be made for a complete interview according to outline. If the request is sent to an out-of-state agency, a copy of Form Adop M67, "Information Concerning Parent of Child to be Adopted" should be included.

If the request is to secure consent for adoption of a child born in wedlock, information should be given as to whether the consent of the other parent has been obtained, or whether such consent is not necessary and, if unnecessary, why; and the length of time the child has been in the home. If further clearance is necessary to show the status of the child this shall be requested specifically.

Consent forms should be attached, made on the proper form and with the verified information regarding the birth of the child. If this information has not yet been verified, it should be so recorded. The form should be left blank regarding the child, but information should be recorded regarding the petitioners and action number.

There should be a brief paragraph regarding the petitioners, their home, the adjustment of the child to the home, and whether or not the home appears satisfactory. This is important, as many parents wish information regarding the petitioners before reaching a decision. If the request is made before the petitioners are interviewed, it should so state, and should give whatever information is available from the petition or questionnaire.

(Section Continued on Next Page)

Requests received by the Department involving either an adoption or placement for adoption will be sent to the Bureau of Adoptions and referred by it as follows:

1. To the County Probation Officer - any request for service involving a stepparent adoption.
2. To the Children's Home Society
 - (a) Requests for interviews with individuals, or exploration of any factors concerning the background of a child being considered for placement for adoption by the referring agency.
 - (b) Request for a home study of a specific child whose circumstances are such that placement outside his own state is indicated. These would fall primarily in the area of special races or religions, or children already known by foster parents now residing in California.
 - (c) Requests for supervision of a foster home in which a child has been placed by the referring agency prior to their moving to California, or when the agency has participated in placement plans for the reasons outlined in b, the adoption to be completed by the agency making the placement.
3. To the Adoption Unit in the District Office or the County Adoption Agency.
 - (a) Any request to obtain consent or interview a natural parent residing in California when the adoption is to be consummated in the other State, whether the placement was made independently or through an agency.
 - (b) Any request for supervisory visits to the home of petitioners with whom a child has been placed independently in another state, and adoption is to be completed in the other state.

(Section Continued on Next Page)

2720-00 REQUESTS FOR SERVICE ON AGENCY ADOPTIONS (RELINQUISHMENTS)

2720-00

A. Request

When an adoption agency requests another adoption agency in California or an agency in another state to interview a natural parent or an applicant, or to make a collateral call, the request should include the following information.

1. The date by which the information is desired;
2. The names and addresses of the individual or individuals to be interviewed, with any other information which might be helpful to the person taking the interview, such as directions for reaching the home, when interviewee may be seen, and whether an office interview will be acceptable.
3. The particular points to be cleared in the interview, indicating any other information which would be desirable.

If after making a request the agency finds that the interview is no longer necessary, it should immediately notify the second agency.

B. Reply

1. An attempt should be made to clear the request at the earliest possible moment. If there is unusual delay the second agency should notify the requesting agency. If the second agency writes to the interviewee requesting a conference, a copy of the letter should go to the requesting agency.
2. The report of the interview should be in outline form.

2740-00 SERVICES TO AGENCIES IN OTHER STATES

2740-00

- A. Requests from agencies, either public or private, in other states, for investigation or services in connection with adoptions should be directed to the Sacramento office of SDSW for referral to the proper agency. They may, however, be directed to the district office of SDSW, to the Children's Home Society, or to the county welfare departments.

If the district office or agency receives such a request directly from the agency it shall send to the Adoption Bureau in Sacramento a copy of the letter with notation that the matter is being handled by it.

(Section Continued on Next Page)

The report should be informational only and should not include any recommendation, as the Department and the agencies in California have no authority to recommend except on a petition filed in this State.

Information regarding placement may be omitted from the report if it is not pertinent. It should be obtained, however, and a statement attached to the copies of the report for the district office and the Adoption Bureau covering the following points:

1. How did the individual learn of the agency?
2. How was placement arranged?
3. Statement of individuals as to information furnished by them to the agency, and by the agency to them regarding the child.
4. Any other information obtainable regarding policies, procedures, and practices of the out-of-state agency.

This material is important, since it may assist the Department in developing better inter-state placement practices.

2740-00 (Continued)

2740-00

- (c) Any request for the investigation of a foster home when placement has not yet been made but the adoption is to be consummated in California as an independent adoption.
- (d) Collateral calls other than routine reference calls. Agencies requesting reference calls are notified by the Department that time does not permit the Department to undertake that service.

B. Investigation

The investigation should be made or other service requested by the agency should be rendered as promptly as possible and with the same thoroughness as though the Department or agency were making the entire investigation. If the requesting agency does not submit an outline for interview, the appropriate outline used in this State may be followed in interviewing and dictating.

When the request involves not only the investigation but permission to send a child into the State, the agency receiving the request should state in its reply to the out-of-state agency that the California law does not require permission to bring a child into the State. It should suggest, however, that the agency clear with the welfare department of the county in which the child is to be placed for its approval of the entry of the child into the State, as there might later be a question in regard to the dependency of the child.

C. Report

The report should be in narrative report form, with covering letter of transmittal to the agency. Four copies of the report should be made - two for the out-of-state agency (unless an additional copy is requested), one for the district office, and one for the Bureau of Adoptions. This applies to requests sent directly to a district office by an out-of-state agency, referred by the Children's Home Society, or referred by the Bureau of Adoptions.

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FINANCIAL POLICIES AND PROCEDURES

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satisfactory justification for the partial or entire charges of the cost of the property or equipment to the boarding home and adoption programs.

7. The county shall maintain an inventory showing each item of property and equipment for the cost of which reimbursement in the amount of more than \$5 is claimed from funds for the boarding home and adoption programs. Such items of property and equipment shall be numbered, and the number recorded on the inventory to allow positive identification of the individual item. When the use to which any such item of property or equipment is placed is essentially different from that agreed upon with SDSW, or in the lack of such agreement, is essentially different from the purpose for which it was purchased, the decrease in value of such property or equipment will be determined and financial adjustment between the State and the county made accordingly.

Note: Property and equipment is defined as those articles which can be used repeatedly without appreciable impairment of physical condition. Machine and fixture parts which, when placed into use, lose their identity and become part of the machine or fixture are not classed as property and equipment, regardless of cost.

Forms and Procedures

When the county welfare department is the agency administering the adoption program, instructions for the allocation of costs, maintenance of administrative expense worksheet and other records and the submission of reports shall be followed as specified in the SDSW Public Assistance Manual of Policies and Procedures. When the agency administering the adoption program is not the county welfare department, plans for the allocation of costs, maintenance of administrative expense worksheets and other records, and submission of reports will be made by SDSW in cooperation with the individual agency.

Claims for the reimbursement of administrative expense of the adoption program for any calendar quarter will be submitted to SDSW in duplicate at the close of such quarter on Form AD 807.

Column B of Form AD 807 records the amounts allocated the adoption program under the time recording and cost allocation system approved by SDSW for the agency administering the adoption program.

Column C records those items of cost which are allocable to the adoption program, and hence included in Column B, but which are not reimbursable. For example, if the county should in any month utilize positions over and above the limit set forth in the agreement with SDSW, such excess cost would be entered in Column C. Further, if the county purchased a large item of property and equipment without prior agreement with SDSW, and no satisfactory justification was submitted, the portion of the cost allocable to the adoption program would be entered in Column C.

Column D is the difference between Column B and Column C.

2815-00 ADMINISTRATIVE EXPENSE

2815-00

Availability of Subvention

Reimbursement is available to counties administering the adoption programs under license issued by the SDSW pursuant to Section 225m of the Civil Code for the cost of administration of such programs.

Administrative cost will include all those adoption program costs of the county agency licensed by SDSW to administer the adoption program, excluding costs of care. Appropriate cost allocation records and devices must be available to establish the actual portion of the agency's administration costs which is due to the adoption program.

Reimbursable Costs

The following principles will apply in respect to reimbursement of costs, regardless of whether the agency is a county welfare department or some other department of county government:

1. Prior to the issuance of a license by SDSW, agreement will be reached with the county regarding the sums to be spent during the fiscal year separately for salaries and wages, maintenance and operation and capital outlay. These sums will be a limitation upon the reimbursement to the county for the fiscal year.
2. Any prior agreement with the SDSW at the time of issuance of the license or as subsequently amended regarding the numbers and kinds of positions to be used and salaries to be paid will be a limitation upon reimbursement.
3. Reimbursement for amortization of the initial cost of construction or purchase of a building, or for the cost of repairs and alterations, will be allowed only after prior agreement with SDSW. Counties anticipating claiming reimbursement of such expenditures in the adoption program should request specific instructions of the SDSW regarding the information required to be submitted prior to approval.

County welfare departments which are licensed to administer the adoption program may refer to Sections 645-35 and 645-37 of the SDSW Public Assistance Manual of Policies and Procedures.

4. Reimbursement will be allowed for property and equipment (see footnote for definition) where the amount allocated to boarding home and adoption programs altogether is \$5 or less for each item.
5. Whenever the amount so allocated is greater than \$5, but the total cost of the item is less than \$50, reimbursement will ordinarily be allowed without specific approval by SDSW.
6. Whenever the amount so allocated is greater than \$5, and the total cost of the item is greater than \$50, reimbursement will be allowed only on the basis of prior agreement with SDSW or upon submission to SDSW of a

(Section Continued on Next Page)

2830-00 (Continued)

2830-00

Item 3 is the difference between Items 1 and 2. In Item 4, compute the product of the \$200 and the number of children for whom claim is made. Item 5 is the amount claimed, and is equal Item 3 or 4, whichever is the lesser. No entry is to be made in Section II of the report.

Form AD 801 is a supporting schedule to Form AD 800, and sets forth the detail of the cost of care for each child. Under Column 1 show the name of the child, and in Column 2 the case number assigned by the State. In Columns 3 and 4 show the numbers and dates of warrants which, in whole or in part, cover disbursements made for the care of the child. In Column 5 show the payee and in Column 6 show the period covered by service, if a period can be shown. (For example, the period can be shown for board and care, but not for the purchase of clothing.) In Column 7 show the amount of the warrant applicable to the care of the particular child, and in Columns 8, 9, 10 and 11, indicate the purpose of the disbursements.

Where the cost of care is not represented by a cash disbursement, but consists of care in a county institution, Items 1 and 2 will be completed in the usual manner. No entry will be made in Items 3 and 4, and Item 5 will designate the institution rendering the care. Item 6 will show the period covered, and Item 7 the total cost of care extended by the institutions. This total cost will be distributed among Items 8, 9, 10 and 11. In Column 12, Remarks, indicate the rate at which the charge is computed.

Form AD 803 supports Part I, Item 2, Form AD 800. In Columns 1 and 2 enter the name and State case number of the child. Under Item 3, show the amounts collected or collectible by the county to defray the cost of care of the child. A separate amount will be shown for each payor. In Column 4, show the name of the payor.

2830-00 COST OF CARE

2830-00

Availability of Subvention

State subvention is available to reimburse counties, licensed by SDSW to accept relinquishments of children and to place them for adoption, for a portion of the cost of care from the time of relinquishment until placement for adoption after deducting fees collected, or after deducting the amounts stated in an agreement to pay a fee, pursuant to Section 225p of the Civil Code. Any other funds received by the county to defray the cost of care will also be deducted. The amount payable to the county by the State shall not exceed \$200 times the number of children for whom reimbursement is allowed on the claim.

Reimbursable Costs

Cost of care is defined by the expense incurred to meet needs of the child as set forth in Section 2410-00, B 1 c. of this Manual. Cost of care shall be claimed on the basis of actual cash disbursements for the care of the child, except as specified below.

Cost of care may be claimed from the date that the county obtains a relinquishment valid for filing with SDSW, and only for children for whom such a relinquishment has been obtained.

Cost of care may be claimed until the date of placement for adoption, or until the relinquishment is cancelled or rescinded. The date of placement is defined as the date upon which the child is physically placed in a home which has been approved for adoption placement.

The county may, on any quarterly claim, request reimbursement for the care of a relinquished child not yet placed for adoption, provided that \$200 plus amounts received for the care of the child is first deducted from the cost of care.

Once reimbursement in whatever amount has been claimed for the cost of care of a child, no further reimbursement by the State will be allowed for any additional cost of care of the child, regardless of the length of time the county provides care for the child.

Submission of Claim

Claims shall be submitted at the end of each calendar quarter. Request for reimbursement for the care of children placed during one calendar quarter or for whom the relinquishment was cancelled or rescinded shall be included in the claim for the quarter in which the placement cancellation or rescission occurred, or on the claim for the quarter immediately following.

Forms and Procedures

Claim will be made on Form AD 800.

In Section I of the form, the amount entered under Item 1 will be the total of Column 7 of Form AD 801. Item 2 will be the total of Column 3 of Form AD 803.

(Section Continued on Next Page)

2850-00

(Section Continued on Next Page)

2850-00 FORMS USED IN ADOPTION PROCEDURE

2850-00

STATE OF CALIFORNIA

DEPARTMENT OF SOCIAL WELFARE

FORWARD TWO COPIES TO THE
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIA

STATE OF CALIFORNIA

FROM _____ COUNTY

COST OF CARE OF CHILDREN RELINQUISHED FOR ADOPTION
FOR QUARTER BEGINNING _____, 19____ AND ENDING _____, 19____ FISCAL YEAR
(FOR STATE USE ONLY)

I.

1. TOTAL COST OF CARE. \$ _____
2. AMOUNT COLLECTED OR COLLECTIBLE TO DEFRAY THE COST OF CARE. \$ _____
3. COST OF CARE NOT COLLECTED OR COLLECTIBLE. \$ _____
4. NUMBER OF CHILDREN _____ TIMES \$200. \$ _____
5. AMOUNT CLAIMED FROM STATE FUNDS 3 OR 4, WHICHEVER IS LESSER. \$ _____

FOR STATE USE ONLY

II.

1. AMOUNT APPROVED BY STATE DEPARTMENT OF SOCIAL WELFARE FOR THIS CLAIM. \$ _____
2. ADJUSTMENT BY STATE \$ _____
3. AMOUNT ALLOWED BY STATE DEPARTMENT OF SOCIAL WELFARE \$ _____

STATE OF CALIFORNIA
COUNTY OF _____

} ss.

THAT I AM THE EXECUTIVE OFFICER OF THE COUNTY AGENCY LICENSED BY THE STATE DEPARTMENT OF SOCIAL WELFARE TO ACCEPT RELINQUISHMENTS OF AND TO PLACE CHILDREN FOR ADOPTION UNDER SECTION 225P OF THE CIVIL CODE AND UNDER DIVISION 2, PART 3, CHAPTER 1 OF THE WELFARE AND INSTITUTIONS CODE; THAT THE ABOVE STATEMENTS REGARDING THE TOTAL COST OF CARE AND AMOUNTS COLLECTED OR COLLECTIBLE TO DEFRAY THE COST OF CARE ARE TRUE AND ACCURATE AND IN ACCORDANCE WITH LAWS, RULES AND REGULATIONS GOVERNING THESE FUNCTIONS TO BEST OF MY KNOWLEDGE AND BELIEF.

SUBSCRIBED AND SWORN TO BEFORE ME THIS _____ DAY

OF _____, 19____

EXECUTIVE OFFICER OF THE ACCREDITED AGENCY

TITLE

TITLE _____

APPROVED _____

CHAIRMAN, BOARD OF SUPERVISORS

I HEREBY CERTIFY, THAT THE RECORDS OF THIS COUNTY INDICATE THAT THE AMOUNTS CLAIMED ARE DUE AND OWING THE COUNTY FROM THE STATE OF CALIFORNIA UNDER SECTION 2 OF CHAPTER 1126 OF THE STATUTES OF 1947.

SIGNATURE OF COUNTY AUDITOR

FORM AD 800, EFFECTIVE SEPT. 19, 1947
ADOPTION ASSISTANCE AFFIDAVIT
TO BE SUBMITTED QUARTERLY TO
STATE DEPARTMENT OF SOCIAL WELFARE

(Section Continued on Next Page)

FORWARD TWO COPIES TO THE
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIA

STATE OF CALIFORNIA
FROM _____ COUNTY

ADMINISTRATIVE EXPENSE AFFIDAVIT
FOR ADOPTION PROGRAM

FOR QUARTER BEGINNING _____ AND ENDING _____, 19____ FISCAL YEAR
(FOR STATE USE ONLY)

1.	COLUMN A	COLUMN B AMOUNTS REPORTED ON ADMINISTRATIVE EXPENSE WORKSHEETS	COLUMN C AMOUNTS NOT REIMBURSEABLE UNDER STATE DEPARTMENT OF SOCIAL WELFARE REGULATIONS AND AGREEMENTS WITH COUNTIES	COLUMN D AMOUNTS FOR WHICH REIMBURSEMENT IS CLAIMED
	<u>FIRST MONTH</u>			
	1. SALARIES AND WAGES	_____	_____	_____
	2. MAINTENANCE AND OPERATION	_____	_____	_____
	3. CAPITAL OUTLAY	_____	_____	_____
	4. TOTAL FOR MONTH	_____	_____	_____
	<u>SECOND MONTH</u>			
	1. SALARIES AND WAGES	_____	_____	_____
	2. MAINTENANCE AND OPERATION	_____	_____	_____
	3. CAPITAL OUTLAY	_____	_____	_____
	4. TOTAL FOR MONTH	_____	_____	_____
	<u>THIRD MONTH</u>			
	1. SALARIES AND WAGES	_____	_____	_____
	2. MAINTENANCE AND OPERATION	_____	_____	_____
	3. CAPITAL OUTLAY	_____	_____	_____
	4. TOTAL FOR MONTH	_____	_____	_____
	SUMMARY FOR QUARTER TOTAL	_____	_____	_____
II.	FOR STATE USE ONLY			
	1. AMOUNT ALLOWED BY STATE DEPARTMENT OF SOCIAL WELFARE		\$ _____	
	2. ADJUSTMENT BY STATE DEPARTMENT OF SOCIAL WELFARE	\$ _____	\$ _____	
	3. AMOUNT APPROVED ON THIS CLAIM		\$ _____	

STATE OF CALIFORNIA }
COUNTY OF _____ } ss.

I, _____, BEING DULY SWORN, DEPOSE AND SAY: THAT I AM THE EXECUTIVE OFFICER OF THE COUNTY AGENCY ACCREDITED AND LICENSED BY THE STATE DEPARTMENT OF SOCIAL WELFARE TO ACCEPT RELINQUISHMENT OF CHILDREN FOR ADOPTION AND TO PLACE CHILDREN IN HOMES FOR ADOPTION UNDER SECTION 225H OF THE CIVIL CODE AND UNDER DIVISION 2, PART 3, CHAPTER 1, OF THE WELFARE AND INSTITUTIONS CODE AND/OR TO INVESTIGATE INDEPENDENT ADOPTIONS AND THAT TO THE BEST OF MY KNOWLEDGE AND BELIEF, I HAVE FULLY COMPLIED WITH THE LAW, RULES AND REGULATIONS GOVERNING THESE FUNCTIONS; THAT THE ABOVE EXPENDITURES WERE INCURRED IN ADMINISTERING, AND WERE ALLOCATED TO, SUCH PROGRAM AND THAT RECORDS SHOWING THE ABOVE ARE AVAILABLE FOR AUDIT OR REVIEW.

SUBSCRIBED AND SWORN TO BEFORE ME THIS _____ DAY

OF _____, 19____

TITLE _____

EXECUTIVE OFFICER OF THE ACCREDITED AGENCY

TITLE _____

APPROVED _____

CHAIRMAN, BOARD OF SUPERVISORS

I HEREBY CERTIFY, THAT WARRANTS HAVE BEEN ISSUED, OR FUNDS ENCUMBERED, TO PROVIDE LIQUIDATION OF WELFARE ADMINISTRATIVE EXPENDITURES AS REFLECTED BY THAT AGENCY'S STATEMENT OF EXPENDITURES FOR THE MONTH.

SIGNATURE OF COUNTY AUDITOR

FINANCIAL POLICIES AND PROCEDURES

FROM _____ COUNTY
TO ACCOMPANY FORM AD 800 FOR THE QUARTER
BEGINNING _____, 19____ AND ENDING _____, 19____

(Section Continued On Next Page)

MAIN OFFICE
SACRAMENTO
616 K STREET
(14)

LOS ANGELES OFFICE
WASHINGTON BUILDING
311 SOUTH SPRING STREET
(13)

SAN FRANCISCO OFFICE
DAVID HEWES BUILDING
995 MARKET STREET
(3)

Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento 14
October 31, 1947

SOCIAL WELFARE BOARD

BEN KOENIG, CHAIRMAN
1680 NORTH VINE STREET
LOS ANGELES
MRS. RUBY BACIGALUPI
1870 JACKSON STREET
SAN FRANCISCO
JOHN C. CUNEO
922 J STREET
MODESTO
GERALD C. KEPPLER
135 NORTH BRIGHT AVENUE
WHITTIER
REV. THOMAS H. MARKHAM
409 NATIVE SONS' BUILDING
SACRAMENTO
JOHN T. MARTIN
1170 SEVENTH AVENUE
SAN DIEGO
MRS. JESSIE S. WILLIAMSON
2816 OAK KNOLL TERRACE
BERKELEY

RECEIVED
SACRAMENTO, CALIF.
NOV 3 PM 1 35
FRANK M. JORDAN
SECRETARY OF STATE
STATE OF CALIFORNIA
Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

IN REPLY PLEASE REFER
TO:

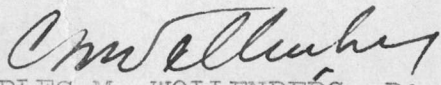
My dear Mr. Jordan:

Attached are three copies of Standards For Aged Institutions in California issued by the State Department of Social Welfare.

These regulations were adopted by the State Social Welfare Board pursuant to the powers conferred upon it by the Welfare and Institutions Code under Sections 103, 2301 of the Welfare and Institutions Code.

The regulations contained therein are to be effective immediately upon filing with the Secretary of State since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare, notice and public procedure thereon being impracticable, unnecessary, or contrary to the public interest.

Very sincerely yours,


CHARLES M. WOLLENBERG, Director
Department of Social Welfare

206:b5
Attachment

Certified as a Regulation (or
Regulations) of the

Dept of Soc. Welf.

(Name of State Agency)

Chas. Salter

(Signature)

Director

(Title)

10/31/47

(Date)

STANDARDS FOR AGED INSTITUTIONS IN CALIFORNIA

Issued By

CALIFORNIA STATE DEPARTMENT OF SOCIAL WELFARE

616 K Street, Sacramento

FILED

in the office of the Secretary of State
of the State of California

NOV 3- 1947

At 1.45 o'clock P. M.

FRANK M. JORDAN, Secretary of State

By

Robert V. Jordan
Assistant Secretary of State

Adopted by the Social Welfare Board on October 23, 1947

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JURISDICTION AND FUNCTIONS OF E
STATE DEPARTMENT OF SOCIAL WELFARE F

Jurisdiction

The State Department of Social Welfare has the responsibility for (1) inspecting and licensing private boarding homes and institutions for the reception or care of aged persons (Section 2300, Welfare and Institutions Code), and (2) supervision of life care contracts (Sections 2350 to 2360, Welfare and Institutions Code). The State Department of Social Welfare has authority to make rules and regulations for the government of such institutions. (Sections 2301 and 2354, Welfare and Institutions Code).

The State Department of Social Welfare, for the purposes of this law, has defined an aged person as one who has reached the age of 65 years, and an institution as a home which accepts sixteen or more aged persons for board and care, or which is so organized or administered that its service is essentially institutional regardless of the number of persons cared for.

The State Department of Social Welfare does not exercise jurisdiction over institutions licensed by the State Departments of Public Health and Mental Hygiene except in instances where such an institution enters into agreements with aged persons to furnish life care or care for more than one year. In this case the institution must be licensed by the State Department of Social Welfare as well as by the other State Department having jurisdiction and must also have a Certificate of Authority from the State Department of Social Welfare to enter into life care contracts.

The State Department of Public Health has jurisdiction over private hospitals, sanatoria, nursing homes, and rest homes, including any institution which maintains and operates organized facilities for the diagnosis, care and treatment of human illness, including convalescence. (Sections 1400 to 1418, Health and Safety Code). Facilities which depend on prayer or spiritual means for healing are excluded.

The State Department of Mental Hygiene has jurisdiction over institutions (hospitals, sanatoria, homes) or other places receiving or caring for mentally ill, alleged mentally ill, or other incompetent persons, including the mentally deficient, alcoholics, drug addicts, and epileptics (Section 5700, Welfare and Institutions Code).

Building Plans

The State Department of Social Welfare requires that building plans for new buildings or additions to or alterations of existing buildings for care of aged be submitted for approval before construction is started. (See appendix for guides in preparing plans).

It is advisable to consult with the State Department of Social Welfare on building plans before blueprints are actually drawn, so that major changes in the blueprints will not be necessary.

It is the institution's responsibility to secure assurance of conformity with local building, health, safety, and zoning ordinances. It is suggested that information regarding local ordinances be secured before blueprints are drawn to avoid major changes to meet local requirements.

Licensing

Application for license should be filed with the State Department of Social Welfare as soon as plans of operation have been made and a location selected. It is the responsibility of the institution to clear with local authorities as to building, zoning, health and safety regulations. The State Department of Social Welfare will request clearance from the State Fire Marshal as to fire safety. The State Department of Social Welfare will inspect the buildings and study the services offered to the aged.

A license will be issued to the legally responsible organization or person if the State Fire Marshal gives clearance and the State Department of Social Welfare's findings indicate that the home is suitable for the care of the aged and that their safety and well-being are assured.

The license shall expire not later than twelve months from the date of issuance, or may be limited to a shorter period. License is subject to revocation for cause. The license is not transferable, applying only to the organization or person to whom license is issued and to the buildings inspected. A change in ownership or location must be reported to the State Department of Social Welfare within forty-eight hours.

Application for renewal of a license must be filed ten days before the expiration of the existing license. Fire safety clearance will be requested by the State Department of Social Welfare. The State Department of Social Welfare will inspect the home and evaluate the services given the aged during the previous year before issuing a renewal license.

An institution which operates without a license is subject to prosecution by the district attorney of the county in which it is located. (Section 2310, Welfare and Institutions Code).

Consultant Services

Visits to the institution by the State Department of Social Welfare are not limited to annual licensing inspections but are a continuing service to the institution for the purpose of giving assistance in solving problems, improving services, and carrying out recommendations previously made.

II. ORGANIZATION OF NON-PROFIT INSTITUTIONS

Every institution must be operated by a responsible individual or governing board. Authority must be clearly defined and responsibility for management as well as for debts and obligations specifically placed.

Incorporation

Institutions of a benevolent, religious, or charitable nature should be incorporated under the laws of California as non-profit organizations. Incorporation fixes liability for debts and obligations in the corporation and defines the right to acquire property and make by-laws governing the acts of the corporation. A copy of the Articles of Incorporation must be filed with the State Department of Social Welfare.

In an institution established by an individual as a commercial enterprise, that individual is fully responsible for any debt or obligation incurred and incorporation is, therefore, unnecessary.

Constitution and By-Laws

Whether incorporated or not, the philanthropic institution shall set up a constitution and by-laws, stating in broad terms the purpose of the institution and establishing a responsible governing board. A copy of the constitution and by-laws shall be filed with the State Department of Social Welfare.

Governing Board

The governing board should be large enough to carry out its responsibilities but not too large to function efficiently. Practice has indicated that a board of not less than nine members nor more than twenty-one is desirable.

The board should include both men and women who are interested in the work of the institution and concerned with the welfare of the aged. They should be elected from the supporting membership of the organization for a definite term of office with expiration of terms so arranged that a rotating board results. Provision should be made for replacement of members who become inactive.

The overlapping of terms and election of one-third of the board membership annually and some restriction on the number of consecutive terms to which a board member can be elected are recommended to insure reasonable continuity of policy as well as new and changing points of view.

There should be on the board at least one member with sufficient business experience to advise the board on investments, fund raising, budgeting, and fiscal procedure. It is also advisable to have members of the medical and legal professions on the board as their specialized knowledge is of great value in setting up policies and procedures for an institution.

Board members shall serve without compensation. No board member shall profit financially by reason of his membership, nor be employed by the institution regularly, either full time or part time. The majority of members of the board should reside in the vicinity in which the institution is located so that they may attend board meetings regularly and keep in touch with the general institution program.

The board should hold meetings at least quarterly and preferably monthly. The superintendent should be included in all regular board meetings. Minutes shall be kept of all board meetings and be available for review by the State Department of Social Welfare.

Functions of Board

The governing board shall be responsible for:

1. Providing adequate services to the aged residents according to the established purpose of the institution, and periodically evaluating the stated purpose of the institution in the light of the current needs of the aged being served.
2. Establishing sound financial practices and securing adequate funds.
3. Establishing policies necessary in the operation of the institution.
4. Interpretation of the services of the institution to the public.
5. Exercise or establishment of trusteeship for property and investments.
6. Maintaining an informed and alert membership and interpreting the work and the needs of the institution to the sponsoring organization.
7. Appointment of a qualified superintendent.

The governing board should not attempt to directly administer and operate the institution. A board's most efficient means of operation is through the appointment of a superintendent who is directly responsible to the board for the operation of the home. The superintendent should have responsibility for direct management of the home under policies established by the board and should have authority for employment of other staff.

Committees of Board

In most instances, the board as a whole cannot devote sufficient time to the institution to be adequately informed of all of its activities. Provision should, therefore, be made for the appointment of standing committees for all of the usual functions and special committees as needed. In general, the following committees are desirable; Finance, Personnel, Admissions, House, and Executive. Committees should confer with the superintendent whenever necessary and always before taking action affecting administration. All committees should entrust administrative detail to the superintendent.

House Rules

Operating rules of the institution should be designed to protect the resident and assure the comfort and happiness of the group as a whole. They should generally be simple and flexible, and restrictive only where absolutely necessary. Each resident should have a copy of the house rules and should be informed of them before entering the home.

Wherever possible, residents should be allowed a voice in the determination of operating rules.

III. BUILDINGS AND EQUIPMENT

Location

The site for an institution for the aged should be carefully chosen, giving due consideration to the following factors:

1. Desirable neighborhood, with good exposures and pleasant surroundings.
2. Accessibility to churches, libraries, stores, clubs, movies, and other business and recreational facilities.
3. Avoidance of excessively busy streets, steep hills, polluted air, and noise.

In a rural location consideration must be given to provision of adequate transportation to residents and staff, varied recreational facilities in the home, and accessibility of lodgings for visitors to both residents and staff. Remote rural locations present additional problems in the recruitment of staff, availability of medical care, purchasing of food, laundry service, water supply, sewage disposal, etc. Aged people may not adjust to rural locations, especially if they have lived most of their lives in a city.

Grounds

The grounds should be attractive and well kept. Lawns, gardens, and shade trees add to the appearance and comfort of the home. Sheltered nooks, summer houses, and outdoor sitting rooms are desirable, and there should be sufficient space for outdoor recreational activities, such as walking, horseshoes, shuffleboard, etc.

Architectural Plan

Institutions for the aged may be on the congregate or the cottage plan, or a combination of the two. The cottage plan offers more freedom and independence to the aged residents, but presents problems of more difficult supervision, increase in upkeep, etc. It is sometimes difficult for residents of cottages to reach common dining and recreation rooms in inclement weather and care of the enfeebled or temporarily ill in their own rooms is more difficult. These disadvantages can be overcome to some extent by providing covered passages between cottages and the central unit, telephone or other communication systems between cottages and the main building, and having quarters in the central building or infirmary for the care of the enfeebled or temporarily ill.

The congregate plan offers more convenient supervision and services, lower cost of upkeep, and easier care of the ill or infirm. Disadvantages of regimentation and lessened independence of guests can be overcome by providing private rooms. The special desires and needs of the aged group to be served and the services offered will be determining factors in the choice of architectural design.

the 4th of November 1941, the following should be noted as being
the 4th of November 1941, the following should be noted as being

III. THE INSTITUTION AND THE INSTITUTIONAL

Location

The site for an institution for the purpose of the following should be noted as being

1. Suitable location, with good access and parking facilities.
2. Accessible to the public, with good access to the public.
3. Accessible to the public, with good access to the public.
4. Accessible to the public, with good access to the public.

In the 1st of November 1941, the following should be noted as being

Location

The site for an institution for the purpose of the following should be noted as being

IV. THE INSTITUTIONAL

The site for an institution for the purpose of the following should be noted as being

The site for an institution for the purpose of the following should be noted as being

Administrative Offices

A private office should be provided for the superintendent with space for files, and other equipment. Provision must be made for privacy in the interviewing of applicants for admission and discussions with residents and staff.

Fire Safety, Accident Prevention, and Health Protection

Institutions for the aged shall conform to the housing, sanitation, and fire safety laws and regulations of the State.

Fire safety clearance from the State Fire Marshal will be requested annually by the State Department of Social Welfare. Sanitary clearance covering water supply, sewage and garbage disposal, lavatory, bath and toilet facilities, preparation, refrigeration and storage of foods, milk supply, and methods of washing dishes, silverware, and utensils may be required.

Care must be taken to prevent home accidents from such causes as slippery floors, loose rugs, inadequate lighting, improperly protected fireplaces, stairways, etc. Any accident involving injury to guests and any fire on the premises shall be reported to the State Department of Social Welfare within forty-eight hours.

Each floor where aged persons are housed shall have at least two exits..

Non-ambulatory guests (those who are incapable of leaving the building without assistance of any type in event of an emergency) shall be housed only on the first floor in rooms having direct means of egress to the outside, except in buildings which have been approved by the State Fire Marshal for the housing of such guests above the first floor.

Window sills shall be high enough to allow aged guests to sit by the windows without danger. French doors should be avoided unless opening onto railed porches.

Stairways must be easily accessible from all bedrooms. They must be gradual in slope and equipped with hand railings. They must be properly lighted, with electric switches at top and bottom.

Night lights should be provided in hallways,

Doors opening onto stairways shall open onto a platform having a dimension in direction of travel at least equal to door width.

Floors should be adequately covered. If rugs are used, only large ones laid or treated to prevent slipping or curling at the edges should be used. Non-slippery surfaces are essential and sound absorbent materials desirable.

Elevators are required for buildings of over two stories and are desirable in two-story buildings. They should be equipped with hand railings inside, automatic operation and leveling devices.

Sleeping Rooms

The sleeping and living accommodations for aged residents are of utmost importance to their comfort and happiness. Since the aged person may live in his room for many years, it is important that the rooms be as attractive as possible and that opportunity be given for individual decoration. Whenever possible, guests should be permitted to bring their own furnishings or some personal belongings to which they are particularly attached. This will often facilitate the guest's adjustment in the home, making the transition to institutional life easier by preserving long standing associations.

Sleeping rooms should be located with convenient access to general living and assembly rooms. Provision must be made to enable residents to reach attendants at night in case of emergency, by call bells or other practical systems. Dependence should not be placed on aged residents to call attendants for other aged residents in need of assistance.

The provision of single rooms for residents, with suites or double rooms for couples, is the best arrangement from the point of view of the guests' happiness and security. If dormitories are used, they should be small, accommodating three or four persons at most. Care should be exercised in placing aged persons with congenial companions in dormitories and the aged guests themselves should be allowed a voice in the matter.

All sleeping rooms shall be adequately lighted and ventilated. A room for one person should provide at least 630 cubic feet of air space, a room for two persons at least 810 cubic feet, and a room for three or more 500 cubic feet for each additional person. Every room must have at least one outside window. A window opening on an enclosed porch is not considered an outside window. In general, window space should equal one-eighth of the total floor area of the room but should not be less than sixteen square feet. Windows should be placed to allow a maximum of light and sunshine, as well as good cross ventilation with an avoidance of drafts. The window sash should move easily and with a minimum of noise. Weather stripping is advisable in some areas. Full-length screens should be used the year round where necessary, and should be easily removable and of non-rusting material.

Sleeping rooms shall be comfortably furnished. Provision must be made for proper care of clothing and personal belongings. Each aged resident should have in his room a bed, dresser, comfortable chair, small table, and any other furnishings necessary for his comfort and happiness. All beds must be equipped with good springs, clean comfortable mattress, pillows, light-weight warm bedding, and rubber sheeting where necessary. Linens should be changed at least once a week and more often if necessary. In double rooms or dormitories, beds shall be at least three feet apart.

All bedrooms should have ample, well-lighted closet space with clothes racks and hat and shoe shelves within easy reach. Hardware on closet doors should be of a type to prevent persons being locked in.

Bedroom doors should be noiseless and easy to operate. Door locks should be of a type which can be operated by a single master key and locked or unlocked from both sides.

Adequate lighting, with switches easily reached from the beds, is essential. Individual bedside lamps, in addition to central fixtures, or wall lights are desirable and night lights may be necessary for some guests.

Electric outlets should be located conveniently in each room. Long electric cords or extensions should not be allowed on floors in such a way as to present danger of tripping. Fire safety requirements regarding electrical appliances and extension cords should be ascertained and followed.

Walls should be soundproof wherever possible and should be washable, light and cheerful in color.

Heating

Adequate, safe, and easily controlled heating must be provided for all living and sleeping quarters. Central heating, thermostat controlled, is most desirable, but other types are acceptable if adequate protection is provided. Fireplaces and open-faced heaters must have metal screens. Gas heaters must be vented and installed with rigid pipe connections. Kerosene heaters are unsafe and electric heaters in bathrooms must be so installed as to avoid any possibility of electrocution.

New installations or changes in type or location of heaters should be made only after determination of compliance with fire safety laws and regulations of the State.

Lavatory and Toilet Facilities

There must be a sufficient number of baths and toilets located convenient to sleeping rooms. Private bathroom or bathrooms located between adjoining rooms are recommended. At least one toilet and washbasin should be provided near the common living room for the use of residents.

Toilets shall be provided at a ratio of at least one to seven persons. If urinals are installed, a ratio of one to twenty is acceptable. Washbasins in the ratio of at least one for eight persons should be provided in the same room with the toilets or in an adjacent room.

Bath facilities should be provided at a ratio of at least one to twenty and may include bathtubs and stall showers. Bathtubs should be of medium size, with a grab bar extending the full length of the tub and within reach of the bather. Rubber mats on the floor

and inside tub and shower reduce the danger of slipping. Stall showers with side sprays, stools, and hand railing are recommended for persons unable to get in and out of tubs with ease. Showers alone are not adequate equipment for an institution for aged. The physical condition of aged persons and their personal preferences make it advisable to have some bathtubs.

Bathrooms and toilets shall be adequately lighted and ventilated. Walls should be washable and should have tiling or other waterproof material to a height of at least four feet from the floor. Floors should be non-absorbent, easily cleaned, and non-slippery. Bathrooms and toilets should be as soundproof as possible.

Living Rooms and Recreation Rooms

There must be at least one large living room centrally located. There should also be smaller sitting rooms providing privacy for entertainment of callers, companionship of congenial residents and small committee or study groups, unless bedrooms are large enough and are also equipped as sitting rooms.

Other rooms for recreation and relaxation should be provided according to the needs and interests of the guests. Some space should be given to a library containing current magazines, newspapers, and books suitable to the interests of the guests.

In large institutions, a general assembly room should be provided for large meetings, entertainments and movies, and for religious services, if there is no chapel.

Living rooms should be comfortably and attractively furnished, well heated and lighted, and clean and cheerful. Wall decorations suited to the taste of the group served, flowers and plants contribute to a homelike atmosphere. Fireplaces, properly safeguarded, provide a cheerful note and make a focal point for group gatherings. Radios and musical instruments add to enjoyment and sociability. Several radios in different rooms should be provided to allow for difference in choice of program without conflict.

Dining Rooms

The dining rooms should be large enough to meet the needs of the population, providing approximately fifteen square feet per person. They should be clean, cheerful, well-ventilated and lighted. The equipment and furnishings should be attractive and comfortable. Tables seating four to eight, with some tables for two for married couples, are advisable. Chairs should be sturdy and well balanced, some with arms, if necessary or desired by residents, to assist in rising. Table linen, silverware, and attractive dishes are recommended. Doilies or place mats may be used on well-finished surfaces.

Tray service should be available when residents are unable to go to the dining room. Occasional meals served in the private rooms add to the comfort and well-being of the guests. Meals in the dining room should be encouraged, however, for the social contacts

afforded and for the regular activity of dressing and moving about in a normal daily routine.

Kitchen

Proper food, well-cooked and attractively served, is essential to the well-being of aged people. Cooking and food service are greatly facilitated by an adequately planned and equipped kitchen. The size of the kitchen and amount of equipment will depend on the number of persons to be served and must be determined on an individual basis.

All kitchens, however, should be planned with the following considerations in mind: convenience, sanitation and healthful working conditions, and control of noise, heat, and odors.

The kitchen should be convenient to the dining room, preferably located on the same floor. If on a different floor level, provision must be made for transporting the prepared food and keeping it at the proper temperature.

The kitchen should be well lighted with windows on two sides to provide cross-ventilation if possible, in addition to mechanical ventilation. Floors should be non-absorbent, non-slippery, and easily cleaned. Working areas and location of equipment should be planned to avoid confusion and waste motion.

Service units generally accommodated in the kitchen are: the main cooking unit; food preparation unit; service space for salads, desserts, and beverages, and preparation of trays; dish-washing unit; and refrigeration unit.

Adequate refrigeration for the protection of perishable foods shall be provided. All food must be protected from insects and rodents.

Cooking utensils, dishes, and tableware must be in good condition and without defects, chips, or cracks. Adequate provision for cleaning this equipment must be made, as governed by the State Health and Safety Code.

Proper disposition shall be made of garbage and trash.

Persons handling foods must wear clean apparel and give special care to cleanliness of hands and forearms. Hair nets, caps or other suitable covering to confine the hair should be worn.

Kitchenettes for the use of residents in preparing tea and snacks should be located convenient to the residents' quarters. These can also be used in preparing meals for temporarily ill guests.

Storage Rooms

The amount of storage space for food will depend on the individual institution but should be large enough for quantity

supplies and those bought for daily use. Storage rooms should be located as close to the kitchen and service entrance as possible, and should be dry, well lighted, and ventilated, and offer protection from mold, vermin, and rodents.

Closets

Closets or storerooms must be available and conveniently located for storage of cleaning equipment, linens, extra equipment, furniture, and trunks, etc., belonging to residents. Closets should be adequately lighted and ventilated.

Special precautions should be taken in the storage of paints, oils, and other inflammable material.

Other Service Areas

Lockers, toilets, and lavatories should be provided for employees convenient to the kitchen and other workrooms. The State Housing Act prohibits construction or use of a toilet opening into a room in which foods are cooked or stored.

Laundry and Sewing Room

Provision must be made for personal laundry of guests and staff as well as the institution laundry. If the work is done on the premises, the laundry should be equipped with labor-saving devices, protective equipment, and room for indoor drying. There should be some place for aged residents to do their own small personal laundry if they so desire.

Space should be provided for sorting and mending linens and for other necessary sewing. Sewing room and machines should be available for residents' use.

Workrooms

Workrooms for maintenance men should be provided as needed as well as porter's closets for cleaning equipment with slop hoppers, etc.

Housekeeping

Housekeeping shall meet an acceptable standard of cleanliness, orderliness, and absence of offensive odors. Regular cleaning should be done by the housekeeping staff, leaving only tidying of rooms to the residents. Assistance should be made available to guests in caring for their rooms and possessions if they are physically unable to do it themselves.

IV. SERVICES TO RESIDENTS

Personal Service

Personal service to the enfeebled aged person must be available and assistance given where needed in bathing, shaving, dressing, hair dressing, and washing, etc.

Food and Nutrition

An adequate nutritious diet, designed to meet the needs of the aged, must be provided. At least three meals a day should be served (morning, noon, and evening) and snacks in the afternoon or before bedtime are often greatly enjoyed by aged persons. Unless residents' quarters are equipped with kitchens, no cooking in the rooms should be allowed. However, guests may be privileged to take to their rooms whole fruit, cookies, or other food not immediately perishable.

Residents should not be restricted nor regimented by bells, gongs, etc., for entering and leaving the dining room. Meals should be scheduled for regular hours and punctuality encouraged, but each resident should be free to leave the dining room at his own pleasure.

Staff who eat in the dining room with the residents should not be served different foods. If the staff use a separate dining room, their food may differ but the quality and attractiveness of the food served to aged residents should not be inferior to that provided for the staff.

The nutritional needs of aged persons differ from the needs of younger adults primarily in quantity. Since the chief functions of food are to supply energy to the body, promote growth and repair tissue, aged persons, who are past the time of growth and who are generally less active, will have diminished food needs. However, the supply of starches, fats and proteins, minerals and vitamins essential for body repair, replacement of tissues, and resistance to infection and disease should be maintained. A slowing up of general body processes makes serving of easily digestible food advisable and for those with dentures or without teeth, soft and easily masticated foods are indicated.

Due consideration should be given to long established food habits, residents being allowed to suggest or request special dishes, especially traditional or national cookery. However, a nutritious and well-balanced diet should be offered and the aged guests encouraged to accept it.

Food must be appetizing and attractively served. Because of the aged persons' general loss of much of the sense of taste, foods which are well seasoned are generally more satisfactory.

The Daily Diet

Meals and menus should be planned by a person with a knowledge of nutrition, food planning, and food service.

Menus should be planned to vary with the season and advantage should be taken of fresh fruits and vegetables in season. In no case should the menu be so planned as to have the same food regularly on the same day of the week.

The daily diet should include:

Milk: one pint to one quart (only pasteurized milk should be used)
Eggs: at least one every other day, plus some used in cooking
Tomatoes or citrus fruit: one serving
Vegetables: two or more servings--one of potatoes and preferably two of other vegetables, green and yellow
Meat or fish: one small serving
Cereal: one serving every morning
Bread: at every meal, whole wheat preferred
Sweets and fats: in moderate amount

Material on "General Suggestions for Food for Aged Persons" is available from the State Department of Social Welfare on request.

Special Diets

Persons in need of special diets should be under a physician's care, and his instructions on diet should be followed.

Home-Canned Foods

All home-canned foods must be processed in accordance with acceptable procedure for proper home canning. A bulletin concerning safe and acceptable methods is obtainable from the University of California Extension Service, Giannini Hall, University of California, Berkeley.

Home-canned vegetables, meat or fish, should not be eaten or tasted without boiling for at least fifteen minutes after removal from the container because of the danger of botulism.

Medical Program

While the institutions to which these standards apply do not have as their primary purpose the care of aged who are ill (such institutions are licensed by the State Department of Public Health) because of the age of the residents and the degenerative diseases to which they are, therefore, susceptible, an adequate plan for medical care is essential. Each institution must make its own policy regarding the care of those guests who become ill, either referring them for care in a hospital or nursing home, or providing the necessary medical and nursing care in the institution. It is essential that medical care be immediately available for any guest who becomes ill.

The institution may include the cost of medical care in its charge for care or the aged guest may be required to meet this expense. An aged person may have his own physician and wish to continue with him, paying for his own medical needs.

The institution's policy with regard to medical care and hospitalization should be clearly understood by each aged guest at the time of his admission to the home.

It is equally important to have a program of routine examinations and preventive care which may reduce the incidence of illness and the progress of degenerative diseases. Pre-admission physical examinations of all guests, including chest X-rays or fluoroscopy are desirable in order that the activities of each aged person may be guided in accordance with his physical condition. Periodic examinations of all guests should be made at least annually, and more often where indicated.

For the comfort and well-being of guests, correction of all remediable defects should be made immediately on discovery, e.g., glasses, hearing aids, etc.

An individual medical file should be kept for each resident and should contain a record of all examinations, illnesses, treatments, medication, and physician's orders. All medical records shall be confidential.

Persons suffering from contagious disease shall not be cared for in an institution for aged.

Institutions operating infirmaries for the care of aged residents who develop illnesses after entering the home must have adequate space, equipment, and personnel for this function. Care should be exercised to avoid giving infirmity care to aged persons as the easiest means of providing care. There is danger of physical and mental deterioration from prolonged and unnecessary bed care.

Care of Senile Aged

Persons who are alcoholics, drug addicts, mentally deficient, mentally ill, or epileptic shall not be admitted to a home for the aged. (See Jurisdiction of State Department of Mental Hygiene, Page 1). Persons suffering from senile psychoses (real mental disorders of old age) shall not be cared for in a home for the aged.

Care of aged persons suffering from the mild senility manifested in loss of memory, mild disorientation, and other mild symptoms is permitted in institutions for the aged. The same degree of care may be needed by a physically infirm but mentally normal aged person as a senile person of pleasant personality and mild symptoms.

The senile aged should not be treated with less respect because of their peculiarities of behavior. Their peculiarities should not be the subject of gossip and their activities should be guided by kindly persuasion. If the individual seems unable to safeguard his health by proper choice of food, exercise, and rest, a physician should be consulted and written instructions obtained.

No form of restraint shall be used in caring for aged persons. No aged person shall be locked in his room at night or by day. Persons needing close supervision to prevent injury to themselves or others should not be cared for in the home for the aged.

Social Service Program

Services to the aged person should begin with his application for admission to the institution and should be a continuing process throughout his stay. Ideally, the institution for the aged should be part of a coordinated program offering family welfare services and financial aid, as well as institutional or boarding home care. The institution normally does not offer all of these services, but it should have a close working relationship with community service agencies in order that the aged person may best be served.

Aged persons may seek admission to an institution because of lack of knowledge of other services available to them or because of fear of disabling illness in the future, or a desire for the security and companionship of institutional life. Many aged persons apply to an institution with little understanding of the change they are undertaking and of the need for adjustment to congregate living and institutional routines.

Of primary importance in intake procedures is the acceptance of the aged person as an individual and the determination of his personal needs and his needs in relation to his family, the community, and to group life. Determination of the individual's needs must be followed by an analysis of the institution's adequacy to meet those needs.

A successful admission of an aged person to an institution and his subsequent successful adjustment in the home depend on the following factors:

1. The making of the plan for entrance to an institution by or with the individual himself and not by children or other relatives acting alone.
2. Adequate interpretation of the meaning institutional placement will have to the individual.
3. Knowledge on the part of the aged person of the programs and functions of the institution and the personal restrictions involved in institutional life.

As much social history as is necessary should be obtained at the time of application in order to determine whether or not the applicant will be able to adjust to group life, as well as to allow continuing service to the individual in the course of his life in the home.

A person's life in the institution should not be an isolated experience but a continuation as far as possible of his whole life experience. Outside contacts should be encouraged and relationships with relatives kept up and strengthened if desirable and possible.

It is recognized that it is not always possible for every aged person to achieve a satisfactory adjustment to group living. Entrance should, therefore, be arranged with the privilege of discontinuance on the part of both the home and the aged guest.

Individual records should be kept for purposes of continuing service to the guest and a minimum record must be kept to conform with the law requiring the maintenance of a register. A register shall be kept which includes the following facts concerning each aged person received or cared for: Name, age, last previous address, nearest of kin, mother's maiden name, person responsible for care and maintenance, the dates of admission and discharge or death. The death of an aged person in the home must be reported in writing to the State Department of Social Welfare within forty-eight hours. Forms for this purpose are provided by the State Department of Social Welfare.

Occupations and Recreation

One of the most important needs of the aged is to feel and be useful. Happiness and social usefulness go hand in hand. Many old people who have looked forward to retirement and the easing of job responsibilities find their lives empty and meaningless without the stimulus and satisfaction of constructive activities. In examining old people who appear to suffer from excessive mental deterioration, it has often been found that deterioration is the result of retirement and not the cause of it.

It is essential to provide congenial occupations for the aged person according to his skills, interests, and health. Voluntary assistance with the work of the institution should be encouraged and other projects of useful activity stimulated. Payment for work performed in the institution is a good principle, especially where the recipient has no financial resources of his own.

It is equally important, since the institution has become the aged person's home, that social activities and recreation be offered in as normal a way as possible.

The development of a satisfying program of occupations and recreation for the aged residents of an institution must be based on their interest, skills, and abilities. To be successful an occupation and recreation program must have the cooperation of the residents and no individual should be urged or pressed to enter into activities before he is ready to do so freely. Such occupations as gardening, woodwork, and repairing of furniture are of great interest to many men and can be a beginning for a broad program of activities. Women are often interested in sewing and knitting and interest in these occupations can often be increased by making them a part of community projects such as Red Cross, foreign relief, and church groups. The values received by old people from such contributions to the community are inestimable. Wherever possible participation in these activities should be in their normal location, outside the institution.

Aged persons should be encouraged to continue previous activities, interests and hobbies, and to participate in community activities wherever possible.

Opportunity for pleasant social activities within the home should also be made available, i.e., tea parties, outings, picnics, birthday celebrations, etc. A library with comfortable chairs, good light, and good reading material is important, as are such games as checkers, chess, and cards.

Outdoor recreation should be arranged wherever possible for the more active aged guests who frequently enjoy such games as croquet, horseshoes, and shuffleboard.

Group recreational activities are of great value, and community singing, literary clubs, and discussion groups are recommended.

Movies, concerts, and other entertainments selected according to the taste of the residents should be regular features where public theaters are not easily accessible, or where the guests are not physically able to go out easily.

Religious Services

Opportunity should be given every aged person to attend services in the church of his choice and to participate in church activities. Provision should be made for those residents who desire it to attend church services outside of the home. Assistance of the clergy or of church members can often be obtained for the aged person unable because of physical handicap to attend church alone.

V. PERSONNEL

The service which any institution for the aged can offer its residents depends on the staff. No institution which is poorly or insufficiently staffed can adequately care for aged persons. While aged residents who are physically active frequently enjoy assisting in functions necessary to the operation of the home, it is essential that sufficient staff be employed to do the work of the institution without placing responsibilities on the guests.

All employees should be qualified by age, health, education, training, and experience for the positions they are to fill and should have in addition qualities of character and temperament suitable for work with the aged. A genuine liking for elderly people, a kindly and sympathetic attitude, and a conviction that old age can be a fruitful and satisfying time of life are important. All employees who work with the aged guests should have some knowledge of the physical and mental infirmities common to the aged as well as an ability to accept each resident as an individual.

Any change in the superintendent or director of an institution shall be reported to the State Department of Social Welfare within forty-eight hours. (Welfare and Institutions Code, Section 2308).

Superintendent

There must be a superintendent responsible for the operation of the institution who should have full responsibility for the daily administration of the home under its established policies, and should have complete responsibility for the selection, supervision, and training of other employees.

The superintendent should have qualities of leadership and managerial ability, preferably with experience in managing an institution. Knowledge and skills in the fields of medicine, nursing, or social work, or experience in institution management are valuable but not essential. A qualified superintendent should be able to utilize such skills in members of his staff or secure and accept consultation of experts in regard to problems in these fields. He should be able to develop and maintain good personnel practices, and should be able and willing to delegate responsibility.

The superintendent should be able to analyze and improve the services of the home in accordance with the needs of the group to be served. In incorporated non-profit institutions, he should be able to interpret the needs of the group and community needs to the governing board and provide leadership to the board in improving services.

He should have knowledge of the social resources of the community and the ability to coordinate the services of the institution with them, interpreting the institution's program to other social agencies and the public.

Other Employees

There must be a suitably qualified person designated to substitute for the superintendent in his absence.

To carry on the functions and services undertaken by the institution, there must be sufficient operating staff, including matrons, attendants, housekeepers, cook and kitchen help, and maintenance workers for house and grounds.

Every institution must have on its staff or available on call a qualified physician, licensed to practice in California, unless each guest has his own physician or the institution is operated by a church or religious group practicing healing by prayer or other spiritual means.

When an institution employs a staff physician, he should be one with special interest in the infirmities of the aged and concerned with preventive care as well as with treatment of illness. Staff physicians should be adequately compensated for their work, preferably on a salaried basis.

The services of medical specialists, psychiatrists, and dentists should be available when necessary.

Qualified nurses should be available on the staff or on call in case of illness, unless residents are immediately removed from the institution when illness occurs.

The employment of such specialized personnel as social workers, recreation workers, and occupational therapists may be advisable. All such personnel shall be qualified by training and experience.

Personnel Practices

Good personnel practices are essential in attracting and keeping adequate staff. They are also of great importance to staff morale and contentment of permanent staff members. Workers who are insecure, discontented, or unhappy cannot, regardless of job qualifications they may have, do good and consistent work.

The following personnel practices are recommended as sound and helpful in securing and retaining adequate staff:

1. Job Specifications: It is advisable to analyze the duties and qualifications for each position or class of position and to use this information in employing workers. A clear understanding of the duties of the job, an understanding of what is expected of the employee and the person in authority to whom he is responsible, should be reached at the time of beginning employment.
2. Records: Records should be kept on all personnel employed and should include an application form, showing qualifications and experience, references from previous employers, and a medical report. Reports on job performance, date of separation, and the reason for leaving should be kept. These are valuable where re-application for employment is made or requests for references are received.
3. Salaries: Salaries should be adequate to attract and hold efficient personnel and should be equivalent to prevailing rates of pay. Provision should be made for merit increases within a salary range for each position.
4. Hours: A basic eight-hour day should be used wherever practical, and in no case should the California wages and hours law for women be violated. Resident staff should have at least two free hours during the day, one full day off a week, and periodic vacations.
5. Vacations: Vacations with pay should be provided according to prevailing practice, with a minimum of two weeks a year.
6. Relief Staff: Adequate relief staff must be available to allow free time and vacations.
7. Sick Leave and Insurance: There should be provision for sick leave for all permanent employees. All employees should be covered by liability or group insurance and where applicable by State and Federal unemployment and old age and survivors insurance.
8. Physical Examinations: A physical examination, including chest X-ray or fluoroscopy, should be given each employee before he begins work and annually thereafter. Employees

should be in good health and free from defects which would interfere with adequate performance on the job.

9. Living Quarters: Comfortable and attractive living quarters should be provided for resident staff where they can enjoy privacy and relaxation in off-duty hours. Bath, lavatory, and toilet facilities for employees only should be located convenient to living quarters. Private apartments with individual baths for all resident staff are recommended. Private recreation and dining rooms should be provided for staff in the larger homes. Kitchenettes where employees may prepare snacks for themselves should also be provided.

VI. FINANCES

Adequate services to the aged residents of an institution are dependent upon a sound financial structure whether operated on a profit or non-profit basis. Sufficient funds must be available at all times to insure adequate care of the aged.

The operator of a private commercial institution should have sufficient business experience to understand financial arrangements and set up good financial procedures. Ability to estimate costs and expenses and establishment of adequate charges for care are essential to sound financial operation. Standards of care shall not be sacrificed for purposes of profit.

A philanthropic institution which does not depend entirely on payments by guests for support must have adequate endowments, reserves, or other sources of income (contributions, Community Chest benefits, lodge assessments, etc.) to insure all necessary services to the aged.

The books of institutions for aged are subject to examination by the State Department of Social Welfare.

Financial Procedures

The State Department of Social Welfare does not set up particular financial procedures or forms for financial records and reports. A number of suggestions are offered on the subject of records and procedures as follows:

1. Financial records should be established showing the amounts and sources of all income and all expenses, assets, and liabilities. Itemized data on the nature of disbursements, e.g., food, rent, utilities, salaries and wages, depreciation, etc., are essential for sound planning.
2. All bills and obligations, including salaries should be paid by check with the exception of minor expenditures which can be made from petty cash.
3. All payments should be authorized by a responsible party, preferably the treasurer of the organization, or owner of the commercial institution.
4. Pre-numbered receipt books should be kept for all cash collections with duplicates for the financial records.

5. All receipts should be deposited daily with a duplicate deposit slip being maintained in file.
6. Deposit of funds should be by an employee other than the employee receiving such money and issuing receipts. For commercial institutions, the owner may wish to handle all receipts and disbursements.
7. All exceptional transactions should be approved in advance by a responsible officer of the organization.
8. Books and accounts of non-profit institutions should be audited annually.
9. Non-profit incorporated institutions should require fidelity bonds for the treasurer and all employees handling substantial amounts of money.
10. The entire financial operations of philanthropic institutions should be on the basis of an annual budget approved by the board.

Financial Arrangements with Residents

Fees

Fees, charges for board and care, and all other financial arrangements between the institution and the aged person should be clearly understood by both parties. In general, financial agreements should be in writing, with a copy for each party, to avoid possibility of error or misunderstanding. The institution's policy as to whether or not refunds are made to guests who leave or die before the end of the period paid for should be clearly stated.

Cash Deposits Held by Home for Residents

Cash and other personal property owned by residents and turned over to the home for safeguarding should be carried on the organization's books and should indicate currently the balances remaining in the individual accounts. All withdrawals should be accounted for by signed numbered receipts. Original transfer of funds should be substantiated in writing and evidence be available for reference. Inventory should be kept of other personal property held by the home for residents with copies for the institution and the resident.

Life Care Contracts

An organization or person receiving transfers of property on condition of furnishing life care or care for more than one year must have a Certificate of Authority from the State Department of Social Welfare in addition to a license to operate a home for aged. (Section 2350-2360, Welfare and Institutions Code).

A separate application must be filed for a Certificate of Authority.

A Certificate of Authority will be issued for a period of twelve months if inspection by the State Department of Social Welfare indicates that fiscal requirements have been met. Application for renewal of the Certificate of Authority must be filed ten days prior to its expiration.

The organization or person shall establish and maintain reserves in an amount not less than the amount necessary as reserves for the agreements of the organization or person in accordance with the standard of valuation based upon McClintock's table of mortality with interest assumption at $2\frac{1}{2}\%$ annually. The reserves shall consist only of the following:

- A. Cash, which shall include:
 - 1. Cash on hand
 - 2. Deposits in demand and term savings accounts with banks which are members of the Federal Deposit Insurance Corporations to the extent that such deposits are insured by such corporation.
 - 3. Investments in certificates issued by building and loan associations which are members of Federal Savings and Loan Insurance Corporations to the extent that such certificates are insured by such corporation.
- B. Securities of which 75% shall be such as are permitted for the investment of funds of savings banks of California. Of the remaining 25% of securities, 10% may consist of preferred stock and 15% common stocks. Said stocks shall be limited to corporations which have an uninterrupted dividend record of at least ten years and must be of a high investment grade. The stocks shall be subject to the approval of the Department of Insurance and any stocks to which it objects shall be eliminated from the required reserve.
- C. Real estate, or equities therein, owned by the organization, to the extent of 60% of the net value thereof as appraised by two appraisers approved by the State Department of Social Welfare.
- D. Furniture and equipment as needed for the operation of the institution to the extent of 50% of the net value thereof as appraised by two appraisers approved by the State Department of Social Welfare.

The State Department of Social Welfare may require any applicant for a Certificate of Authority not a non-profit organization to file with the Department a bond executed by an admitted surety insurer in an amount satisfactory to the Department.

Agreements

The agreement between the aged person and the institution offering life care must show the value of the property transferred, the amount of care to be furnished, and the manner in which care is to be furnished. The State Department of Social Welfare may require that copies of agreements be filed with the Department.

The State Department of Social Welfare may inspect the books and records, or the performance of any service required pursuant to the agreements.

Institutions giving life care should avoid "selling" a particular room to an aged resident as reasons of health or safety may make it inadvisable for him to occupy the room. A prolonged illness where hospitalization is necessary would result in vacancy of a room which could not be used by another aged person.

Refund Penalties on Deposits to Secure Reservations for Life Care

Deposits on reservations in the home pending admittance should be accepted only on the basis of the annual turnover in population. The practice of accepting deposits from prospective applicants in large numbers is not encouraged where vacancies do not exist and where the probability of accommodating all applicants in one year's time is remote. When a deposit is accepted from a prospective applicant for future admission, the depositor should receive, in writing, the assurance that the home will guarantee admission within a specified time limit. In the event the deposit is accepted without such designation, there shall be no penalty assessed by the home if the depositor requests a refund against the original deposit and/or any subsequent payments. A depositor may be considered properly penalized only when he has arranged to take possession of a room at a definite time and then subsequently fails to adhere to the arrangement, demanding the refund of his deposit and other payments made to the institution.

Funds of Deceased Probationers

Any agreement between an aged person and an institution to furnish life care to the aged person should be on the basis of a probationary period of several months' duration, during which time either the home or the aged person may cancel the agreement. The probationary period is of benefit to both the aged person and the institution as it allows time for the aged person to decide on the basis of actual experience in the home whether or not he wishes to remain for the rest of his life and also allows the home to determine whether the individual is acceptable as a member of the group and capable of adjusting to institution life.

In regard to financial agreements, it is presumed that no life care contract is in force until completion of the probationary period, regardless of whether an agreement has been entered into at the time of entrance or during the period of probation. Therefore, if an aged resident dies during his period of probation, the value of property transferred to the home, less a reasonable charge for board and care and/or other properly chargeable expenditures shall be refunded to the estate of the probationer. If securities were transferred, the market value as of the time of the transfer would be the value considered, unless they had been converted into cash, in which

case the amount of cash thus received should be the basis of the refund. If real property was transferred, the appraised value or a fair value agreed upon by the transferor and transferee at the time of transfer should be the basis of the refund.

Charges for Care to Members Withdrawing from the Institution

Homes permitting voluntary withdrawal of life members should not charge exorbitant rates for care in arriving at the net amount to be refunded, in order to avoid working a hardship on the aged person in making other suitable provision for his care. The charge for care should be based on the average per capita cost of the home for the period elapsed.

Guides for Preparing Building Plans

Where the organization or owner is submitting plans for a new building or for additions or major alterations to existing buildings, these guides should be followed in preparing blueprints:

1. Four copies of the blueprints shall be submitted to the State Department of Social Welfare. In some localities additional copies are necessary for local officials.
2. The architect drawing up plans should follow the provisions of the latest edition of the Uniform Building Code.
3. Plans submitted should include a plot plan to scale showing the location of the proposed building, other property located within fifty feet, the nearest property line, the street intersection, and any pertinent information which would assist in locating the proposed building on the property.
4. Blueprints should include a complete floor plan of the proposed building, indicating all exit facilities such as stairways, ramps, and doors. The direction of the swing of doors, width of corridors, and width of doors and windows should be shown.
5. If heating equipment is to be installed in the basement, a detailed plan of this area with the type of equipment to be used, method of venting, and type of fuel is necessary. In all instances the location of the heating equipment and first aid fire-fighting equipment should be indicated in the plans.
6. A brief, concise statement on the face of the blueprints is needed to describe general building construction specifications. For example: Exterior walls, one-hour metal lath and stucco; interior walls, metal lath and 3/4" plaster; floors, concrete slab; roof, Class C asbestos shingles, etc.

Excerpts from the Welfare and Institutions Code Applicable to Aged
Institutions

Division 3, Chapter 2, Institutions and Boarding Homes for
Aged Persons

2300. No person, association, or corporation shall, without first having obtained a written license or permit therefor from the State Department of Social Welfare or from an inspection service approved or accredited by the department, maintain or conduct any institution, boarding home, or other place for the reception or care of aged persons, nor receive or care for any such person.

2301. The State Department of Social Welfare shall make such rules and regulations as it deems best for the government of any institution or for the performance of any service specified in Section 2300 of this code, and the department may, by a member or any duly authorized representative, inspect and examine any such institution, home, or place, or the performance of any such service.

2303. A permit or license issued by the State Department of Social Welfare or by an approved and accredited inspection service shall expire twelve months from its date of issuance.

2304. Application for renewal of a permit or license shall be filed 10 days prior to its expiration. If such application is not so filed, such license or permit is automatically canceled. Where a hearing is held under this section the proceedings shall be conducted in accordance with Chapter 5 of Part 1 of Division 3 of Title 2 of the Government Code, and the department shall have all the powers granted therein.

2305. Permits or licenses may be revoked for cause after a hearing before the State Department of Social Welfare or an approved and accredited inspection service. The proceedings shall be conducted in accordance with Chapter 5 of Part 1 of Division 3 of Title 2 of the Government Code, and the department shall have all the powers granted therein.

2306. No license shall be transferred. Neither the location of any institution, boarding home, or other place specified in Section 2300, nor the place of performance of any service specified therein shall be changed without the written consent of the State Department of Social Welfare or of an approved and accredited inspection service.

2307. Every holder of a permit or license shall maintain a register setting forth the following facts concerning each aged or infirm person received or cared for:

- (a) Name.
- (b) Last previous address.
- (c) Age.
- (d) Nearest of kin.
- (e) Mother's maiden name.

- (f) The person responsible for his care and maintenance.
- (g) Such other data as the State Department of Social Welfare requires.

2308. Upon the occurrence of any death of an aged person or change in the administrative personnel of any such home, the holder of the license or permit shall, within forty-eight hours, give written notice thereof to the State Department of Social Welfare or to the approved and accredited inspection service by which such license or permit was issued.

2309. Any person, association, or corporation that maintains, conducts, or, as manager or officer or in any other administrative capacity, assists in maintaining or conducting any institution, boarding home, or other place, or performance of any service specified in Section 2300 of this code, without first having secured a license or permit therefor, in writing, or refuses to permit or interferes with the inspection authorized in Section 2301 of this code, is guilty of a misdemeanor.

2310. The district attorney of every county shall, upon application by the State Department of Social Welfare or its authorized representatives, or by an approved and accredited inspection service, institute and conduct the prosecution of any action brought for the violation within his county of any of the provisions of this chapter.

2311. The provisions of this chapter shall not prevent local authorities of any city or city and county, within the reasonable exercise of the police power from adopting rules and regulations, by ordinance or resolution, prescribing standards of sanitation, health and hygiene for institutions, boarding homes and other places for the reception or care of aged persons, not in conflict with the provisions of this chapter, and requiring a local health permit to maintain or conduct any such boarding home or institution within such city or city and county.

Division 3, Chapter 3, Supervision of Life Care Contracts

2350. Any organization or person maintaining a home for the aged may receive transfers of property conditioned upon his agreement to furnish life care or care for a period of more than one year to the transferor or his nominee, when granted a certificate of authority by the State Department of Social Welfare; provided, such organization or person has received a written license or permit pursuant to Chapter 2 of this division.

2350.5. Before issuing the certificate of authority, the State Department of Social Welfare may, if it deems it necessary to safeguard the interests of the aged in the State, require any applicant for a certificate to file with the department a bond executed by an admitted surety insurer, in an amount satisfactory to the department, conditioned that the principal will faithfully perform all obligations undertaken by him pursuant to the certificate of authority, to and for the use and benefit of all persons who may be

injured or aggrieved by the failure of the principal to perform any such obligation, and any person so injured or aggrieved may bring suit on such bond, in his own name, without an assignment thereof.

This section shall not apply to any charitable, religious, benevolent, fraternal, educational, or other nonprofit organization or society maintaining a home for the aged.

2351. Upon granting the certificate of authority to receive transfers of property, the State Department of Social Welfare shall require the organization or person to establish and maintain reserves in an amount not less than the amount necessary as reserves for the agreements of the organization or person in accordance with the standard of valuation based upon McClintock's table of mortality among annuitants, with interest assumption at $2\frac{1}{2}$ per cent per annum. Failure to maintain reserves as provided in this section shall be deemed a breach of any agreement to furnish life care or care for a period of more than one year as provided in Section 2350.

The reserves shall consist only of the following:

- (a) Cash, which shall include:
 - (1) Cash on hand;
 - (2) Deposits in demand and term savings accounts with banks which are members of the Federal Deposit Insurance Corporation, to the extent that such deposits are insured by such corporation;
 - (3) Investments in certificates issued by building and loan associations which are members of the Federal Savings and Loan Insurance Corporation, to the extent that such certificates are insured by such corporation.
- (b) Securities of which 75 per cent shall be such as are permitted for the investment of funds of savings banks of California. Of the remaining 25 per cent of securities, 10 per cent may consist of preferred stocks and 15 per cent may consist of common stocks. Said stocks shall be limited to corporations which have an uninterrupted dividend record of at least 10 years and must be of a high investment grade. The stocks shall be subject to the approval of the Department of Insurance and upon the request of the Department of Insurance any stocks to which it objects shall be eliminated from the required reserve.
- (c) Real estate, or equities therein, owned by the organization or person, to the extent of 60 per cent of the net value thereof, as appraised by two appraisers approved by the State Department of Social Welfare.

- (d, Furniture and equipment as needed for the operation of the institution to the extent of 50 per cent of the net value thereof as appraised by two appraisers approved by the State Department of Social Welfare.

2352. The State Department of Social Welfare may require the filing with the department of a copy of any agreement entered into between the certificate holder and the transferor, by every organization holding a certificate of authority to receive transfers under this chapter.

2353. The agreement must show:

- (a) The value of the property transferred;
- (b) The amount of care agreed to be furnished to the transferor or his nominee;
- (c) The manner in which the care is to be furnished.

2353.1. If the agreement permits dismissal or discharge of the aged person from the home prior to the expiration of the agreement, with or without cause, an amount equal to the difference between the amount paid in and the amount used for the care of the aged person during the time he remains in the institution, based upon the per capita cost to the institution, shall be refunded to the transferor; however, in cases where a consideration greater than the minimum charge has been paid for accommodations above standard, a sum equal to the difference between the amount paid in and the ratio of the amount paid to the minimum consideration for standard accommodations times the current per capita cost to the institution applied to the period the aged person remained in the institution shall be refunded to the transferor. If the per capita cost to the institution during the period can not be established otherwise, the cost during the period shall be deemed to be the cost at the time of the dismissal or discharge.

2353.2. Whenever action is brought by or on behalf of an aged person against any organization or person maintaining a home for the aged for breach of an agreement to furnish life care or care for more than one year to the aged person, the plaintiff may, at the time of issuing the summons, or at any time afterward, have the property of the defendant, in an amount not to exceed the amount paid in or the value of the property transferred to the defendant at the time of the transfer, attached as security for the satisfaction of any judgment that may be recovered, unless the defendant gives security to pay such judgment, as provided in Chapter 4 of Title 7 of Part 2 of the Code of Civil Procedure.

2354. The State Department of Social Welfare shall make such rules and regulations as it deems best for the government of any institution or organization specified in Section 2350 in order that the rights of aged persons may be protected. The department may, by any member or any duly authorized representative, inspect and examine any such institution, home, or place, books and records of the performance of any service required pursuant to the agreement.

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2354.1. In lieu of making a detailed financial investigation, the State Department of Social Welfare may accept an annual audit of the organization or person made by a certified public accountant.

2355. A certificate of authority issued by the State Department of Social Welfare shall expire 12 months from its date of issuance, and application for renewal of same shall be filed 10 days prior to its expiration. Where a hearing is held under this section the proceedings shall be conducted in accordance with Chapter 5 of Part 1 of Division 3 of Title 2 of the Government Code, and the department shall have all the powers granted therein.

2356. Certificates of authority may be revoked for cause after a hearing before the State Social Welfare Board. The proceedings shall be conducted in accordance with Chapter 5 of Part 1 of Division 3 of Title 2 of the Government Code, and the board shall have all the powers granted therein.

2357. For the failure of any organization or person to establish and maintain reserves as provided in this chapter, the State Department of Social Welfare shall, after due notice, revoke its certificate of authority. The department may request the Department of Insurance to aid in the determination as to whether or not sufficient reserves are established and maintained.

2358. No certificate of authority shall be transferred. Neither the terms of the agreement, nor the place of performance specified in any agreement, shall be changed without the written consent of the State Department of Social Welfare.

2359. Any person, association, or corporation that maintains, enters into, or, as manager or officer or in any other administrative capacity, assists in maintaining or entering into any agreement providing for transfer of property, conditioned upon an agreement to furnish life care to the transferor or his nominee, without first having secured a certificate of authority therefor in writing, or refuses to permit or interferes with the inspection authorized in this chapter, is guilty of a misdemeanor.

2360. The district attorney of every county shall, upon application by the State Department of Social Welfare or its authorized representatives, institute and conduct the prosecution of any action brought for the violation within his county of any of the provisions of this chapter.

Certified as a Regulation (or as
Regulations) of the

Dept of Soc. Sec.

(Name of State Agency)

Matthew

(Signature)

Director

(Title)

11/7/47

(Date)

MAIN OFFICE
SACRAMENTO
616 K STREET
(14)

LOS ANGELES OFFICE
WASHINGTON BUILDING
311 SOUTH SPRING STREET
(13)

SAN FRANCISCO OFFICE
DAVID HEWES BUILDING
995 MARKET STREET
(3)

Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento 14
November 6, 1947

SOCIAL WELFARE BOARD

BEN KOENIG, CHAIRMAN
1680 NORTH VINE STREET
LOS ANGELES

MRS. RUBY BACIGALUPI

1870 JACKSON STREET

SAN FRANCISCO

JOHN C. CUNEO

922 J STREET

MODESTO

GERALD C. KEPPLE

135 NORTH BRIGHT AVENUE

WHITTIER

REV. THOMAS H. MARKHAM

409 NATIVE SONS' BUILDING

SACRAMENTO

JOHN T. MARTIN

1170 SEVENTH AVENUE

SAN DIEGO

MRS. JESSIE S. WILLIAMSON

2816 OAK KNOLL TERRACE

BERKELEY

Hon. Frank M. Jordan
Secretary of State
Room 109 State Capitol
Sacramento, California

IN REPLY PLEASE REFER
TO:

My dear Mr. Jordan:

Attached are three copies of the following regulations
issued by the State Department of Social Welfare.

MANUAL LETTER NO. 110

These regulations were adopted by the State Social
Welfare Board pursuant to the powers conferred upon it by
the Welfare and Institutions Code under Sections 103,
103.5, 103.6, and 114b, and are being filed in accordance
with provisions of Section 11381 of the Government Code.

Very sincerely yours,

Charles M. Wollenberg

CHARLES M. WOLLENBERG, Director
Department of Social Welfare

206:b5
Attachment

FILED

in the office of the Secretary of State
of the State of California

NOV 10 1947

At 1:10 o'clock P. M.

FRANK M. JORDAN, Secretary of State

By *Robert M. Jordan*
Assistant Secretary of State

CHARLES M. WOLLENBERG
Director

EARL WARREN
Governor

FILED
in the office of the Secretary of State
of the State of California

NOV 10 1947

At 1:10 o'clock P. M.

FRANK W. JORDAN, Secretary of State

By *Robert Jordan*
Assistant Secretary of State

1297

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE

616 K STREET
SACRAMENTO 14

November 5, 1947

MANUAL LETTER NO. 110

The attached revisions are to be entered in your copy of the Manual of Policies and Procedures and the revision numbers cancelled on the separators of the revised chapters. Revision numbers are as follows:

Welfare and Personnel Standards	Revisions 70 and 71
Personal Property	Revision 79
Income	Revision 61
Glossary	Revisions 25 and 26
Financial Procedures	Revisions 304 thru 345

These revisions were approved by the Social Welfare Board on October 24, 1947.

Sec. 070-00 has been revised to delete certain material no longer applicable and having to do with war duration employment.

Sec. 143-05 as revised states the correct policy already in effect in ANC, namely that encumbrances against items of personal property are not deductible in determining the value of personal property.

Sec. 152-10 carries a revision of value of occupancy in those cases where the home is assessed at \$3,001 or over. The value of occupancy in such cases is now \$9.

The definitions of what constitutes Constructive Fraud, Actual Fraud and Mistake of Fact have been revised from definitions formerly in the Glossary.

Revisions attached for the Financial Procedures Chapter consist of revised forms relating to Administrative Expense policy sections released in October with Manual Letter 109. Sections 629-99, 646-99, 655-99, and 674-99 are being replaced by the attached revisions.

The attached Index has been revised and includes revisions to public assistance manual up to and including Manual Letter Number 109.

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REISSUED OCTOBER 24, 1947

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070-00

5. COUNTY AGENCY--the department or departments within the counties which administer Federal-State grants-in-aid as follows:
 - a. Aid to Needy Children. (CHAPTER 1, PART 2, DIVISION 2, W&IC)
 - b. Old Age Security. (CHAPTER 1, DIVISION 3, W&IC)
 - c. Aid to Needy Blind. (CHAPTER 1, PART 1, DIVISION 5, W&IC)
 - d. Child Welfare Services. (CHAPTER 1, SECTION 120, DIVISION 1, W&IC)
6. DEMOTION--a change in status of an employee, from a position in one class to a position in another class having lesser duties and responsibilities, and lower qualifications as described in Sec. 075-60, Demotion.
7. DIRECTOR--the Director of the SDSW.
8. DISMISSAL--the termination of employment of an employee for cause.
9. ELIGIBLE--an applicant for a merit examination who receives a final passing rating and whose name appears on an eligible list.
10. ELIGIBLE LIST--an officially promulgated list of eligibles for a class of position in the order of their final rating in a merit examination as described in Sec. 073-00, Establishment of Eligible Lists.
11. EMERGENCY APPOINTMENT--an appointment made during an actual emergency to prevent the stoppage of public business.
12. EMPLOYEE--any person in the employ of the SDSW not now covered by the State Civil Service Act or by related statutes, or in the employ of a county agency who is engaged on a full- or part-time basis in the administration and operation of State public assistance and Child Welfare Services programs, except that the provisions of this section shall not apply to:
 - a. Persons specifically exempted under definition 4 of this section;
 - b. Personnel of welfare departments in approved civil service counties, and in such additional counties as may hereafter adopt a merit system in accordance with the State enabling statutes; it shall be understood, however, that in view of the responsibility of the SSWB for development and maintaining standards to insure proper and efficient administration of the State public assistance and Child Welfare Services programs, it shall be the duty of the SSWB to approve, and from time to time review for maintenance of standards, the aforementioned merit systems covering the personnel of county agencies of those counties in the State now operating under a merit system and such additional counties as may elect to establish merit systems by ordinance at some future date.
13. EMPLOYMENT LIST--eligible list, promotional eligible list and re-employment list.

(Section Continued on Next Page)

070-00 DEFINITIONS
WPS

070-00

The following definitions apply throughout these rules, unless the context clearly requires another meaning:

1. APPOINTING AUTHORITY--the officer, board, commission, person, or group of persons authorized by statute or lawfully delegated authority to make appointments.
2. APPOINTMENT--the offer to and acceptance by a person of a position in the classified service through selection from an eligible list in accordance with Sec. 074-00, Original Appointments.
3. CLASS--a group of positions sufficiently similar as to duties performed, degree of supervision exercised or required, minimum requirements of education, experience, or skill, and such other qualifications that the same title, the same test of fitness and the same schedule of compensation may be applied to each position in the group.
4. CLASSIFIED SERVICE--all positions in the SDSW and county agencies except:
 - a. Members of the State Social Welfare Board.
 - b. The Director of the State Department of Social Welfare.
 - c. Members of any advisory board.
 - d. Personnel employed in county agencies performing duties entirely unrelated to administration of duties outlined in definition 5, unless the county board of supervisors specifically requests that such personnel be included in the Merit System in the classified service.
 - e. Members of county boards of supervisors.
 - f. Members of county welfare boards.
 - g. Physicians designated as approved ophthalmologists for aid in the blind examinations and paid on a fee basis for professional services.
 - h. State and local officials serving ex officio and performing incidental administrative duties in the public assistance and child welfare services program.
 - i. Janitors and gardeners employed by county agencies on a full-time or part-time basis.
 - j. Mechanics employed by county agencies in servicing and repairing automotive equipment.
 - k. Regular employees of a county welfare department who perform only intermittent, irregular, or occasional work on the programs mentioned in Definition 5, provided that the portion of the salary allocated to such program or programs does not exceed ten per cent (10%) of the minimum monthly rate of pay for his respective position.
 1. Persons who serve a county welfare department intermittently, irregularly, or occasionally (including services rendered by State licensed professional personnel) and who are compensated on a contract or fee basis.

(Section Continued on Next Page)

070-00 (Continued)

070-00

29. PROVISIONAL APPOINTMENT--an appointment made in the absence of any appropriate eligible list as provided for in these rules.
30. PROVISIONAL EMPLOYEE--an employee holding a position under provisional appointment.
31. REEMPLOYMENT LIST--a list of persons of a particular class, but regardless of the county agency, who have probationary or permanent status and who have been legally laid-off.
32. RESIGNATION--the termination of employment of an employee made at the request of the employee.
33. SDSW--the State Department of Social Welfare as provided by Statutes 1937, Chapter 397, exclusive of the Social Welfare Board.
34. SALARY or WAGE--the amount of money or credit received as compensation for service rendered exclusive of mileage, traveling allowances, and other sums received for actual and necessary expenses incurred in the performance of duties in a position of the classified service.
35. SALARY ADVANCEMENT--an increase in salary within the salary range prescribed for the class by the agencies' compensation plan.
36. STATE AGENCY OR SSWB--the Social Welfare Board duly constituted as provided by Statutes 1937, Chapter 397.
37. SUSPENSION--an enforced leave of absence for disciplinary purposes or pending investigation of charges made against an employee.
38. TRANSFER--a change from one position to another in the same class or in another class having the same or comparable duties, responsibilities, and entrance qualifications as described in Secs. 075-50, Inter-Agency Transfer of Employee, and 075-55, Inter-Class Transfer of Employee.
39. VETERAN--any person who has served in the U. S. Army, Navy, Marine Corps, Revenue Marine Service, or as an active nurse in the service of the American Red Cross, or in the Army and Navy Nurse Corps in time of war, or in any expedition of the armed forces of the U. S., and received an honorable discharge or certificate of honorable active service, proof of which shall be submitted prior to the date of the examination and under the conditions prescribed by the SSWB. The term "veteran" shall include also any person who has been inducted into the armed forces of the U. S. under the provisions of the Selective Training and Service Act of 1940 and who has received an honorable discharge therefrom.
40. WAIVER--the voluntary relinquishment by an eligible of any right to consideration for appointment and assignment to a specific position.
(W&IC 119.5, 119.6)

00-070-00 (Continued)

070-00

14. EXAMINING AGENCY--the State Personnel Board (or any duly authorized employee of the State Personnel Board) or other public personnel agency, selected by the SSWB, to conduct the merit system examinations.
15. EXEMPT POSITION--a position herein designated as a position exempted from the application of this rule.
16. LAY-OFF--termination of employment of an employee without prejudice, because of lack of funds or work, because of natural changes of duties or organization, or in order to permit reinstatement of employee upon his release from period of military service in the armed forces of the U. S.
17. LIMITED TERM APPOINTMENT--an appointment from an eligible list to a position which is established for a limited period not to exceed one day less than the probationary period.
18. LIMITED TERM EMPLOYEE--an employee who holds a position under limited term appointment.
19. MINIMUM QUALIFICATIONS--the qualifications of education and experience, and other qualifications to be measured by written examination or by written examinations and qualification appraisal interviews, as prescribed for a given class in the agencies' classification plan.
20. PERMANENT EMPLOYEE--an employee who has permanent status.
21. PERMANENT STATUS--the status of an employee who is lawfully retained in his position after the completion of the probationary period provided in these rules.
22. PERSONNEL OFFICER--the Departmental Personnel Officer of the SDSW. Duties of this officer are described in Sec. 070-35, Personnel Officer.
23. POSITION--any office or employment in the classified service (whether part-time or full-time, temporary or permanent, occupied or vacant), calling for the performance of certain duties by an "employee" as defined by definition 12.
24. PROBATIONARY PERIOD--the first twelve months of employment following the date of original appointment to a permanent position as described in Sec. 074-50, Nature, Purpose, and Duration of Probationary Period.
25. PROBATIONARY STATUS--the status of an employee who has been certified and appointed from an eligible list or a promotional eligible list but who has not completed the probationary period.
26. PROBATIONER--an employee who has probationary status.
27. PROMOTION--a change in status of an employee, from a position in one class to a position in another class having higher duties and responsibilities and higher qualifications as described in Sec. 075-00, Method of Making Promotions.
28. PROMOTIONAL ELIGIBLE LIST--a list of persons eligible for certification for a specific class resulting from a promotional examination.

(Section Continued on Next Page)

143-15 ENCUMBRANCES ON PERSONAL PROPERTY
OAS, ANB, APSB, ANC

143-15

In ANB and APSB, encumbrances of record shall be deducted from the county assessed valuation of personal property in determining eligibility.

In OAS, encumbrances of record shall be deducted from the current market value of personal property holdings in determining eligibility for aid.

In ANC, encumbrances against items of personal property shall not be deducted in determining the value of the personal property. The full market value of notes or other securities which have been assigned or hypothecated to assure payment of certain debts, shall be considered in determining eligibility for aid, unless actual transfer of ownership is affected. For exception in case of loans against insurance, see Secs. 143-05, Determination of Value of Personal Property, and 143-87, Effect of Loans Against Insurance.

The market value of the equity in personal property being purchased under contract of sale shall be included when determining the total value of personal property. See Secs. 142-00, 142-05, and 142-10, Limitations on Personal Property, for personal property which is not considered in OAS, ANB, and ANC.

When the market value in OAS or the county assessed value in ANB and APSB of all personal property considered in determining eligibility is well within the maximum, no verification of encumbrances need be made. The total value, without regard to encumbrances, may be stated in the case record, but encumbrances reported by the applicant or recipient, should be noted.

In OAS, when an increase in market value of personal property holdings or the acquisition of additional personal property, causes the total value to approach, equal or exceed \$600, the amount of encumbrances, if any, shall be established.

See Sec. 132-03, Encumbrances of Record Deducted from Assessed Value of Real Property, which applies likewise to personal property. (SEE SEC. 233-00, VERIFICATION OF REAL AND PERSONAL PROPERTY.)

There are many forms of encumbrances against personal property. Some of the more common are:

1. Chattel mortgage;
2. Loans, including those for which stocks or bonds are collateral;
3. Attachments for debts, taxes, etc.;
4. Pledges (see Glossary, pledges). (W&IC 1560, 2140, 3075, 3460)

143-00 DETERMINATION OF VALUE OF PERSONAL PROPERTY
OAS

143-00

The current market value of items of personal property not specifically exempt in the OAS law, is used in determining the value of personal property holdings. The amount of all encumbrance against the property is deducted from the total market value. (SEE SECS. 142-00, LIMITATIONS ON PERSONAL PROPERTY, AND 143-15, ENCUMBRANCES ON PERSONAL PROPERTY.) (W&IC 2140, 2163)

143-05 DETERMINATION OF VALUE OF PERSONAL PROPERTY
ANC

143-05

The actual amount of cash on **hand**, in bank accounts (commercial, savings, and others), in postal savings and building and loan association accounts, shall be considered in determining the value of personal property holdings. The net current cash surrender value of nonexempt insurance (see Sec. 143-83, Distinction Between Exempt and Nonexempt Insurance as Personal Property), and the market value of stocks, bonds, notes, mortgages, deeds of **trust**, etc., shall be considered in establishing eligibility.

Encumbrances against items of personal property shall not be deducted from the market value. See Sec. 143-82, Definitions of Insurance Terms, for method of determining the net cash surrender value of encumbered **insurance** policies. (W&IC 1521, 1560)

143-10 DETERMINATION OF VALUE OF PERSONAL PROPERTY
ANB, APSB

143-10

The total county assessed value of the applicant's separate personal property and his share of community personal property, less all encumbrances of record thereon, shall be considered in determining eligibility. (SEE SECS. 141-00, TYPES OF PERSONAL PROPERTY, 141-10, OWNERSHIP OF PERSONAL PROPERTY DEFINED, AND 146-00 CONVERSION OF PROPERTY.) The local county assessors's rolls shall be searched for the current year or for the most recent year for which the records are available.

Encumbrances of record claimed by the applicant shall be recorded in the county case record and investigated if the total assessed value of real and personal property approaches, equals, or exceeds \$3,500.

The county case record shall contain a report of the search and other verification as required in Sec. 132-03, Encumbrances of Record Deducted from Assessed Value of Real Property. (SEE SEC. 142-05, LIMITATIONS ON PERSONAL PROPERTY.) (W&IC 3047, 3447)

152-10 (Continued)

152-10

Unencumbered homes having a county assessed value of \$500 or less, have a minimum value of occupancy of \$3.00 per month. The value of occupancy shall be increased at the rate of \$1.00 per month for each additional \$500 assessed valuation or fraction thereof, up to a maximum of \$9.00 per month. The following table sets forth the occupancy value of unencumbered homes in accord with the county assessed valuation of the property.

Value of Occupancy of Unencumbered Homes

Assessed Value	Value of Occupancy
\$500 or less	\$3.00
\$501 to \$1000	4.00
1001 to 1500	5.00
1501 to 2000	6.00
2001 to 2500	7.00
2501 to 3000	8.00
3001 or over	9.00

The application of the table may be modified when basic needs of the recipient other than shelter can not be met due to the excessive cost of taxes or assessments. In such event the case record shall show the particular cost which necessitated a modification of the table.

Encumbered homes have a value of occupancy which shall be determined by subtracting from the appropriate value of occupancy as shown in the table for unencumbered homes the required monthly payment on liens (including principal and interest). The remainder, if any, is the net value of occupancy on encumbered homes.

EXAMPLE A: PROPERTY OWNED BY A SINGLE RECIPIENT ASSESSED AT \$1200 IS ENCUMBERED FOR \$250. MONTHLY PAYMENTS ON THE ENCUMBRANCE ARE \$3.00 (PRINCIPAL \$2.50 AND INTEREST 50¢).

VALUE OF OCCUPANCY FROM TABLE FOR UNENCUMBERED HOMES	\$5.00
LESS PAYMENTS ON ENCUMBRANCE	3.00
NET VALUE OF OCCUPANCY	\$2.00

When payments on liens, including principal and interest, or on a contract of sale (principal and interest) are required to be paid periodically, i.e., quarterly, semi-annually, annually, or at other stated non-monthly intervals, the required payment shall be pro-rated on a monthly basis. This pro-rated figure shall be considered as the equivalent of the required monthly payment, and shall be deducted from the table value of occupancy in order to determine the net value of occupancy.

(Section Continued on Next Page)

152-10 OCCUPANCY VALUE OF HOMES OWNED BY RECIPIENTS
OAS, ANB, APSB

152-10

In OAS and ANB, the value of currently used resources shall be considered in determining the amount of aid. Homes owned and occupied by recipients of OAS and ANB are considered currently used resources and the value of their use shall be considered in computing the grant. In APSB, the value of the use and occupancy of premises owned and occupied by the applicant or recipient is exempt from consideration until the income, together with that from other exempt sources, exceeds \$800 per year. (SEE SEC. 151-30, DEFINITION OF EXEMPT INCOME IN APSB.)

The value of occupancy is determined in accordance with the assessed value of the property. The full assessed value is considered in determining the value of occupancy to the recipient, whether he alone occupies the home which he owns or whether it is shared with his spouse, or with others who may, or may not, have an interest in the property.

If the home is the separate property of the ineligible spouse who alone is bearing the cost of upkeep, taxes, etc., the recipient is, in fact, receiving free rent. The value is determined as in any other case in which free rent is contributed by another.

The recipient who holds life estate in the property he occupies is guaranteed the use of the resource and its occupancy value shall be considered in the same manner as though the recipient held title to the property.

(Section Continued on Next Page)

(Section continued on next page)

STATE OF CALIFORNIA

Forward TWO copies to the
State Department of Social Welfare
Sacramento

CLAIM FOR FEDERAL AND STATE AID FOR OLD AGE SECURITY

PAID BY XXX COUNTY

Month of November, 1947 WARRANTS DATED
November 1, 1947

Form Ag 801

Form 8-28-1534 (Indicate Non-County Cases by (*), Non-Federal Cases by (**), and Non-County Non-Federal Cases by (***) in Column 3)

1	2	3	4	5	6	7	8
NAME	STATE NUMBER	TOTAL AID PAID UNDER OLD AGE SECURITY LAW	AMOUNT IN EXCESS OF \$45 ON FEDERAL CASES	FEDERAL SHARE NON-COUNTY CASES	STATE SHARE NON-COUNTY AND NON-FEDERAL CASES (Completion of Columns 5 and 6 Optional)	DO NOT WRITE IN THIS SPACE	WARRANT NUMBER
Family Given							
Jones Tom	1	55.00	10.00			(SEE SEC. 627-20, APPORTIONMENT OF GRANTS ON PAYROLLS OR CLAIMS.)	1111
Smith Dick	2	*60.00	15.00				1112
Brown Harry	3	38.00					1113
West Bridget	4	*25.00					1114
Greene Hercules	5	60.00	15.00				1115
Conner Brenda	6	**48.00					1116
Wilson Cobina	7	47.00	2.00				1117
Stewart Adolph	8	37.50					1118 11/17/47
White Maggie	9	***60.00					1119 11/17/47
Black Fritz	10	**30.00					1120 11/17/47
Jones Henry	11	40.00				(SEE EXAMPLE A, SEC. 627-15, PARTIAL MONTHS' CLAIMS - DATES FOR STATE AND FEDERAL PARTICIPATION.)	1121 11/17/47
Williams James	12	25.67				(SEE EXAMPLE I, SEC. 627-25, COUNTY INSTITUTIONAL CLAIMS.)	1122 11/17/47
		526.17	42.00				

Total number of persons on this page
9 eligible 3 ineligible to Federal
(Warrants covering increases not to be counted in number of persons)

Form Ag 801—Revised MARCH, 1947
Pay Roll to Accompany Affidavit (Form AG 800)

Page No. 1

STATE OF CALIFORNIA

Forward TWO copies to the
State Department of Social Welfare
Sacramento

CLAIM FOR FEDERAL AND STATE AID FOR OLD AGE SECURITY

PAID BY XXX COUNTY Supplement for
Prior Months
WARRANTS DATED

Month of November, 1947 See Column 8

Form Ag 801

Form 8-28-1534 (Indicate Non-County Cases by (*), Non-Federal Cases by (**), and Non-County Non-Federal Cases by (***) in Column 3)

1	2	3	4	5	6	7	8
NAME	STATE NUMBER	TOTAL AID PAID UNDER OLD AGE SECURITY LAW	AMOUNT IN EXCESS OF \$45 ON FEDERAL CASES	FEDERAL SHARE NON-COUNTY CASES	STATE SHARE NON-COUNTY AND NON-FEDERAL CASES (Completion of Columns 5 and 6 Optional)	DO NOT WRITE IN THIS SPACE	WARRANT NUMBER
Family Given							
						JULY, 1947	
Jones Tom	1	12.50	10.00			CASE #1 REPRESENTS APPEAL TO BOARD, INC. FROM \$45.00 TO \$55 FROM 7/1/47 TO 10/31/47. APPEAL SIGNED AUGUST 8, 1947.	1111 11/1/47
						AUGUST, 1947	
Jones Tom	1	12.50	10.00				1111 11/1/47
						SEPTEMBER, 1947	
Jones Tom	1	12.50	10.00				1111 11/1/47
Wilson Cobina	7	6.00	2.00			CASE #7 REPRESENTS RETRO-ACTIVE INCREASE FROM \$41.00 TO \$47.00 FROM 7/1/47 PAID IN NOVEMBER.	1117 11/1/47
Stewart Adolph	8	**37.50				CASE #8 REPRESENTS RETRO-ACTIVE AID UNDER 60-DAY LAW.	1118 11/17/47
						OCTOBER, 1947	
Jones Tom	1	12.50	10.00				1111 11/1/47
Wilson Cobina	7	6.00	2.00				1117 11/1/47
Stewart Adolph	8	**37.50					1118 11/17/47
		137.00	44.00				

NOTE: Individual warrants for each month or one warrant covering all months for each case may be issued, the amount paid for each month to be reported separately.

Total number of persons on this page
0 eligible 2 ineligible to Federal
(Warrants covering increases not to be counted in number of persons)

Form Ag 801—Revised MARCH, 1947
Pay Roll to Accompany Affidavit (Form AG 800)

Page No. 2

629-99 County Aid Claim Forms

629-99

OAS; ANB; APSB; ANC

STATE OF CALIFORNIA		FORM AG 800	
AID AFFIDAVIT		FORWARD TWO COPIES TO THE STATE DEPARTMENT OF SOCIAL WELFARE SACRAMENTO, CALIFORNIA	
FROM <u>XXX</u> COUNTY			
FOR OLD AGE SECURITY			
MONTH OF <u>November</u> , 19 <u>47</u> FISCAL YEAR			
(STATE USE ONLY)			
AMOUNT DUE FROM FEDERAL FUNDS FOR AID		CURRENT MONTH COLUMN A	PRIOR MONTHS COLUMN B
1. TOTAL AID PAID UNDER OAS LAW (ITEM E, COL. 1, FORM AG 802) NUMBER OF AGED PERSONS: CURRENT MONTH <u>12</u> ; PRIOR MONTHS <u>2</u>		\$ 526.17	\$ 137.00
2. AMOUNT PAID TO AGED PERSONS INELIGIBLE FOR FEDERAL AID (TOTAL ITEMS A & B, COL. 1, FORM AG 802) NUMBER OF PERSONS: CURRENT MONTH <u>3</u> ; PRIOR MONTHS <u>2</u>		\$ 138.00	\$ 75.00
3. TOTAL AID IN EXCESS OF \$45 PAID TO AGED PERSONS ELIGIBLE FOR FEDERAL AID (ITEM E, COL. 2, FORM AG 802) \$.....		\$ 42.00	\$ 44.00
4. TOTAL OF ITEMS 2 AND 3.....		\$ 180.00	\$ 119.00
5. BASIS FOR FEDERAL PARTICIPATION (ITEM 1 MINUS ITEM 4).....		\$ 346.17	\$ 18.00
6. AMOUNT DUE FROM FEDERAL FUNDS FOR AID (ITEM E, COL. 3, FORM AG 802).....		\$ 195.58	\$ 9.00
7. FEDERAL SHARE OF ADJUSTMENTS (TOTAL COL. 7, FORM ABC 803).....		\$ 5.00	
8. FEDERAL SHARE OF CANCELLED WARRANTS FOR PRIOR MONTHS (TOTAL COL. 9, FORM AG 804).....		\$ 113.00	
9. FEDERAL SHARE OF COLLECTIONS (TOTAL COL. 7, FORM ABC 803).....		\$ 74.48	
10. TOTAL OF ITEMS 7, 8, AND 9.....		\$ 192.48	
11. NET AMOUNT DUE FROM FEDERAL FUNDS FOR AID (ITEM 6 MINUS ITEM 10).....		\$ 3.10	
12. TOTAL AMOUNT DUE FROM FEDERAL FUNDS FOR AID (ITEM 11, COL. A, PLUS ITEM 6, COL. B).....		\$ 12.10	
AMOUNT DUE FROM STATE FUNDS FOR AID			
13. AMOUNT DUE FROM STATE FUNDS FOR AID (ITEM E, COL. 4, FORM AG 802).....		\$ 298.37	\$ 109.46
14. STATE SHARE OF ADJUSTMENTS (TOTAL COL. 8, FORM ABC 803) \$.....		\$ 12.50	
15. STATE SHARE OF CANCELLED WARRANTS FOR PRIOR MONTHS (TOTAL COL. 10, FORM AG 804).....		\$ 159.17	
16. STATE SHARE OF COLLECTIONS (TOTAL COL. 8, FORM ABC 803) \$.....		\$ 54.59	
17. TOTAL OF ITEMS 14, 15, AND 16.....		\$ 226.26	
18. NET AMOUNT DUE FROM STATE FUNDS FOR AID (ITEM 13 MINUS ITEM 17).....		\$ 72.11	
19. TOTAL AMOUNT DUE FROM STATE FUNDS FOR AID (ITEM 18, COL. A, PLUS ITEM 13, COL. B).....		\$ 181.57	
AMOUNTS FOR REPORTING PURPOSES ONLY			APPROVAL STAMP
20. TOTAL ADJUSTMENTS (TOTAL COL. 6, FORM ABC 803).....		\$ 20.00	
21. TOTAL CANCELLED WARRANTS FOR PRIOR MONTHS (TOTAL COL. 7, FORM AG 804) \$.....		\$ 296.00	
22. TOTAL COLLECTIONS (TOTAL COL. 6, FORM ABC 803).....		\$ 140.00	
STATE OF CALIFORNIA, COUNTY OF <u>XXX</u>) SS			
I, <u>Jane Doe</u> BEING DULY SWORN, DEPOSE AND SAY: THAT I AM THE COUNTY OFFICIAL RESPONSIBLE FOR THE ADMINISTRATION OF OLD AGE SECURITY IN AND FOR THE SAID COUNTY; THAT ALL PROVISIONS OF CHAPTER 1 OF DIVISION III OF THE WELFARE AND INSTITUTIONS CODE, AND AMENDMENTS THERETO, AND TITLE I OF THE SOCIAL SECURITY ACT, AND AMENDMENTS THERETO, HAVE BEEN COMPLIED WITH TO THE BEST OF MY KNOWLEDGE AND BELIEF.			
SUBSCRIBED AND SWORN TO BEFORE ME THIS <u>7th</u> DAY			
OF <u>December</u> , 19 <u>47</u>		<u>Jane Doe</u> SIGNATURE OF WELFARE DIRECTOR OR OFFICIAL IN CHARGE	
<u>Mary Jones</u> Deputy County Clerk		TITLE <u>Director</u>	
I HEREBY CERTIFY, THAT WARRANTS COVERING ALL AMOUNTS DUE UNDER THE LAW HAVE BEEN ISSUED AND CHARGED TO FUNDS FOR AID IN ACCORDANCE WITH THE OLD AGE SECURITY LAW, CHAPTER 1 OF DIVISION III OF THE WELFARE AND INSTITUTIONS CODE, AND AMENDMENTS THERETO.		APPROVED <u>Richard Roe</u> CHAIRMAN, BOARD OF SUPERVISORS	
		<u>John Smith</u> SIGNATURE OF COUNTY AUDITOR	
FORM AG 800, REVISED OCTOBER 1, 1947 AFFIDAVIT TO ACCOMPANY MONTHLY PAYROLL (FORM AG 801)			
CREDIT VOUCHER CLAIM-AID			

(Section continued on next page)

629-99 (Continued)

629-99

FORM Ag 802

STATE OF CALIFORNIA
 RECAPITULATION SHEET
 FROM XXX COUNTY
 FOR OLD AGE SECURITY
 MONTH OF November, 1947
 (INCLUDE ONLY AID COVERING MONTHS AFTER OCTOBER 1, 1946)

STATE OF CALIFORNIA
 DEPARTMENT OF SOCIAL WELFARE
 SACRAMENTO, CALIFORNIA
 SUPPLEMENT FOR MONTHS PRIOR
 TO AUGUST 1, 1947

	COLUMN 1 TOTAL AID PAID UNDER THE OLD AGE SECURITY LAW (TOTAL COL. 3, FORM AG 801)	COLUMN 2 AMOUNT IN EXCESS OF \$45.00 IN FEDERAL CASES (TOTAL COL. 4, FORM AG 801)	COLUMN 3 FEDERAL SHARE	COLUMN 4 STATE SHARE	COLUMN 5 COUNTY SHARE
A) NONFEDERAL CASES TOTAL, COL. 1 STATE SHARE, COL. 4 (5/6 OF TOTAL) COUNTY SHARE, COL. 5 (1/6 OF TOTAL)	\$			\$	\$
B) NONFEDERAL-NONCOUNTY CASES TOTAL, COL. 1 STATE SHARE, COL. 4 (SAME AS COL. 1)	\$			\$	
C) NONCOUNTY CASES TOTAL, COL. 1 EXCESS, COL. 2 FEDERAL SHARE, COL. 3 STATE SHARE, COL. 4 (SEE WORKSHEET BELOW FOR COMPUTATIONS)	\$	\$	\$	\$	
D) REGULAR CASES TOTAL, COL. 1 EXCESS, COL. 2 FEDERAL SHARE, COL. 3 STATE SHARE, COL. 4 COUNTY SHARE, COL. 5 (SEE WORKSHEET BELOW FOR COMPUTATION)	\$ 12.50	\$ 10.00	\$ 1.25	\$ 9.38	\$ 1.87
E) GRAND TOTALS (AMOUNTS TO BE CARRIED FORWARD TO AFFIDAVIT FORM AG 800, AS NOTED)	\$ 12.50 (TO ITEM 1)	\$ 10.00 (TO ITEM 3)	\$ 1.25 (TO ITEM 6)	\$ 9.38 (TO ITEM 13)	\$ 1.87 (TO ITEM 23)

WORKSHEET FOR COMPUTING FEDERAL, STATE, AND COUNTY SHARES ON NONCOUNTY AND REGULAR CASES

I NONCOUNTY CASES (ITEM C ABOVE)

FEDERAL SHARE

TOTAL NONCOUNTY CASES (ITEM C, COL. 1).....\$

LESS: EXCESS ON NONCOUNTY CASES (ITEM C, COL. 2).....\$

EQUALS: TOTAL BASIS FOR FEDERAL PARTICIPATION.....\$

LESS: 2/3 BASIS FOR FEDERAL PARTICIPATION
(NUMBER) NONCOUNTY CASES ELIGIBLE FOR
FEDERAL PARTICIPATION X \$15).....\$

FEDERAL SHARE IS 2/3, OR \$

BALANCE IS 1/2 BASIS FOR FEDERAL PARTICIPATION.....\$

" " " 1/2, OR \$

TOTAL FEDERAL SHARE NONCOUNTY CASES.....\$

(ITEM C, COL. 3, ABOVE)

STATE SHARE

TOTAL NONCOUNTY CASES (ITEM C, COL. 1).....\$

LESS: FEDERAL SHARE.....\$

EQUALS: STATE SHARE (ITEM C, COL. 4 ABOVE).....\$

II REGULAR CASES (ITEM D ABOVE)

FEDERAL SHARE

TOTAL REGULAR CASES (ITEM D, COL. 1).....\$ 12.50

LESS: EXCESS ON REGULAR CASES (ITEM D, COL. 2).....\$ 10.00

EQUALS: TOTAL BASIS FOR FEDERAL PARTICIPATION.....\$ 2.50

LESS: 2/3 BASIS FOR FEDERAL PARTICIPATION
(NUMBER) REGULAR CASES ELIGIBLE FOR FEDERAL
PARTICIPATION X \$15).....\$ -0-

FEDERAL SHARE IS 2/3, OR \$ -0-

BALANCE IS 1/2 BASIS FOR FEDERAL PARTICIPATION.....\$ 2.50

" " " 1/2, OR \$ 1.25

TOTAL FEDERAL SHARE REGULAR CASES.....\$ 1.25

(ITEM D, COL. 3, ABOVE)

STATE SHARE

TOTAL REGULAR CASES (ITEM D, COL. 1).....\$ 12.50

LESS: FEDERAL SHARE.....\$ 1.25

EQUALS: BASIS FOR STATE AND COUNTY PARTICIPATION.....\$ 11.25

STATE SHARE IS 5/6, OR \$ 9.38

(ITEM D, COL. 4, ABOVE)

COUNTY SHARE IS 1/6, OR \$ 1.87

(ITEM D, COL. 5, ABOVE)

FORM AG 802, REVISED OCTOBER 1, 1946
 RECAPITULATION SHEET TO ACCOMPANY
 PAYROLL (FORM AG 801)

(Section continued on next page)

(Section continued on next page)

STATE OF CALIFORNIA
 RECAPITULATION SHEET
 FROM XXX COUNTY
 MONTH OF NOVEMBER, 1947
 (INCLUDE ONLY AID COVERING MONTHS AFTER AUGUST 1, 1947)

FORWARD TWO COPIES TO
 STATE DEPARTMENT OF SOCIAL WELFARE
 SACRAMENTO, CALIFORNIA

	COLUMN 1 TOTAL AID PAID UNDER THE OLD AGE SECURITY LAW (TOTAL COL. 3, FORM AG 801)	COLUMN 2 AMOUNT IN EXCESS OF \$45.00 IN FEDERAL CASES (TOTAL COL. 4, FORM AG 801)	COLUMN 3 FEDERAL SHARE	COLUMN 4 STATE SHARE	COLUMN 5 COUNTY SHARE
A) NONFEDERAL CASES TOTAL, COL. 1 STATE SHARE, COL. 4 (6/7 OF TOTAL) COUNTY SHARE, COL. 5 (1/7 OF TOTAL)	\$ 78.00			\$ 66.86	\$ 11.14
B) NONFEDERAL-NONCOUNTY CASES TOTAL, COL. 1 STATE SHARE, COL. 4 (SAME AS COL. 1)	\$ 60.00			\$ 60.00	
C) NONCOUNTY CASES TOTAL, COL. 1 EXCESS, COL. 2 FEDERAL SHARE, COL. 3 STATE SHARE, COL. 4 (SEE WORKSHEET BELOW FOR COMPUTATIONS)	\$ 85.00	\$ 15.00	\$ 40.00	\$ 45.00	
D) REGULAR CASES TOTAL, COL. 1 EXCESS, COL. 2 FEDERAL SHARE, COL. 3 STATE SHARE, COL. 4 (SEE WORKSHEET BELOW FOR COMPUTATIONS)	\$ 303.17	\$ 27.00	\$ 155.58	\$ 126.51	\$ 21.08
E) GRAND TOTALS (AMOUNTS TO BE CARRIED FORWARD TO AFFIDAVIT, FORM AG 802, AS NOTED)	\$ 526.17 (TO ITEM 1)	\$ 42.00 (TO ITEM 3)	\$ 195.58 (TO ITEM 6)	\$ 298.37 (TO ITEM 13)	\$ 32.22 (TO ITEM 23)

WORKSHEET FOR COMPUTING FEDERAL, STATE, AND COUNTY SHARES ON NONCOUNTY AND REGULAR CASES

I) NONCOUNTY CASES (ITEM C ABOVE)

FEDERAL SHARE
 TOTAL NONCOUNTY CASES (ITEM C, COL. 1).....\$ 85.00
 LESS: EXCESS ON NONCOUNTY CASES (ITEM C, COL. 2).....\$ 15.00
 EQUALS: TOTAL BASIS FOR FEDERAL PARTICIPATION.....\$ 70.00
 LESS: 2/3 BASIS FOR FEDERAL PARTICIPATION
 NONCOUNTY CASES ELIGIBLE FOR
 (NUMBER) FEDERAL PARTICIPATION X \$15).....\$ 30.00 FEDERAL SHARE IS 2/3, OR \$ 20.00
 BALANCE IS 1/2 BASIS FOR FEDERAL PARTICIPATION.....\$ 40.00 " " " 1/2, OR \$ 20.00
 TOTAL FEDERAL SHARE NONCOUNTY CASES.....\$ 40.00
 (ITEM C, COL. 3, ABOVE)

STATE SHARE
 TOTAL NONCOUNTY CASES (ITEM C, COL. 1).....\$ 85.00
 LESS: FEDERAL SHARE.....\$ 40.00
 EQUALS: STATE SHARE (ITEM C, COL. 4, ABOVE).....\$ 45.00

II) REGULAR CASES (ITEM D ABOVE)

FEDERAL SHARE
 TOTAL REGULAR CASES (ITEM D, COL. 1).....\$ 303.17
 LESS: EXCESS ON REGULAR CASES (ITEM D, COL. 2).....\$ 27.00
 EQUALS: TOTAL BASIS FOR FEDERAL PARTICIPATION.....\$ 276.17
 LESS: 2/3 BASIS FOR FEDERAL PARTICIPATION
 REGULAR CASES ELIGIBLE FOR FEDERAL
 (NUMBER) PARTICIPATION X \$15).....\$ 105.00 FEDERAL SHARE IS 2/3, OR \$ 70.00
 BALANCE IS 1/2 BASIS FOR FEDERAL PARTICIPATION.....\$ 171.17 " " " 1/2, OR \$ 85.58
 TOTAL FEDERAL SHARE REGULAR CASES.....\$ 155.58
 (ITEM D, COL. 3, ABOVE)

STATE SHARE
 TOTAL REGULAR CASES (ITEM D, COL. 1).....\$ 303.17
 LESS: FEDERAL SHARE.....\$ 155.58
 EQUALS: BASIS FOR STATE AND COUNTY PARTICIPATION.....\$ 147.59
 STATE SHARE IS 6/7, OR \$ 126.51
 (ITEM D, COL. 4, ABOVE)
 COUNTY SHARE IS 1/7, OR \$ 21.06
 (ITEM D, COL. 5, ABOVE)

FORM AG 802, REVISED OCTOBER 1, 1947
 RECAPITULATION SHEET TO ACCOMPANY
 PAYROLL (FORM AG 801)

FORM AG 802

STATE OF CALIFORNIA
 RECAPITULATION SHEET
 FROM XXX COUNTY
 MONTH OF NOVEMBER, 1947
 (INCLUDE ONLY AID COVERING MONTHS AFTER AUGUST 1, 1947)

FORWARD TWO COPIES TO
 STATE DEPARTMENT OF SOCIAL WELFARE
 SACRAMENTO, CALIFORNIA

SUPPLEMENT FOR PRIOR MONTHS

	COLUMN 1 TOTAL AID PAID UNDER THE OLD AGE SECURITY LAW (TOTAL COL. 3, FORM AG 801)	COLUMN 2 AMOUNT IN EXCESS OF \$45.00 IN FEDERAL CASES (TOTAL COL. 4, FORM AG 801)	COLUMN 3 FEDERAL SHARE	COLUMN 4 STATE SHARE	COLUMN 5 COUNTY SHARE
A) NONFEDERAL CASES TOTAL, COL. 1 STATE SHARE, COL. 4 (6/7 OF TOTAL) COUNTY SHARE, COL. 5 (1/7 OF TOTAL)	\$ 75.00			\$ 64.29	\$ 10.71
B) NONFEDERAL-NONCOUNTY CASES TOTAL, COL. 1 STATE SHARE, COL. 4 (SAME AS COL. 1)	\$			\$	
C) NONCOUNTY CASES TOTAL, COL. 1 EXCESS, COL. 2 FEDERAL SHARE, COL. 3 STATE SHARE, COL. 4 (SEE WORKSHEET BELOW FOR COMPUTATIONS)	\$	\$	\$	\$	
D) REGULAR CASES TOTAL, COL. 1 EXCESS, COL. 2 FEDERAL SHARE, COL. 3 STATE SHARE, COL. 4 COUNTY SHARE, COL. 5 (SEE WORKSHEET BELOW FOR COMPUTATIONS)	\$ 49.50	\$ 34.00	\$ 7.75	\$ 35.79	\$ 5.96
E) GRAND TOTALS (AMOUNTS TO BE CARRIED FORWARD TO AFFIDAVIT, FORM AG 802, AS NOTED)	\$ 124.50 (TO ITEM 1)	\$ 34.00 (TO ITEM 3)	\$ 7.75 (TO ITEM 6)	\$ 100.08 (TO ITEM 13)	\$ 16.67 (TO ITEM 23)

WORKSHEET FOR COMPUTING FEDERAL, STATE, AND COUNTY SHARES ON NONCOUNTY AND REGULAR CASES

I) NONCOUNTY CASES (ITEM C ABOVE)

FEDERAL SHARE
 TOTAL NONCOUNTY CASES (ITEM C, COL. 1).....\$
 LESS: EXCESS ON NONCOUNTY CASES (ITEM C, COL. 2).....\$
 EQUALS: TOTAL BASIS FOR FEDERAL PARTICIPATION.....\$
 LESS: 2/3 BASIS FOR FEDERAL PARTICIPATION
 NONCOUNTY CASES ELIGIBLE FOR
 (NUMBER) FEDERAL PARTICIPATION X \$15).....\$ FEDERAL SHARE IS 2/3, OR \$
 BALANCE IS 1/2 BASIS FOR FEDERAL PARTICIPATION.....\$ " " " 1/2, OR \$
 TOTAL FEDERAL SHARE NONCOUNTY CASES.....\$
 (ITEM C, COL. 3, ABOVE)

STATE SHARE
 TOTAL NONCOUNTY CASES (ITEM C, COL. 1).....\$
 LESS: FEDERAL SHARE.....\$
 EQUALS: STATE SHARE (ITEM C, COL. 4, ABOVE).....\$

II) REGULAR CASES (ITEM D ABOVE)

FEDERAL SHARE
 TOTAL REGULAR CASES (ITEM D, COL. 1).....\$ 49.50
 LESS: EXCESS ON REGULAR CASES (ITEM D, COL. 2).....\$ 34.00
 EQUALS: TOTAL BASIS FOR FEDERAL PARTICIPATION.....\$ 15.50
 LESS: 2/3 BASIS FOR FEDERAL PARTICIPATION
 REGULAR CASES ELIGIBLE FOR FEDERAL
 (NUMBER) PARTICIPATION X \$15).....\$ -0- FEDERAL SHARE IS 2/3, OR \$ -0-
 BALANCE IS 1/2 BASIS FOR FEDERAL PARTICIPATION.....\$ 15.50 " " " 1/2, OR \$ 7.75
 TOTAL FEDERAL SHARE REGULAR CASES.....\$ 7.75
 (ITEM D, COL. 3, ABOVE)

STATE SHARE
 TOTAL REGULAR CASES (ITEM D, COL. 1).....\$ 49.50
 LESS: FEDERAL SHARE.....\$ 7.75
 EQUALS: BASIS FOR STATE AND COUNTY PARTICIPATION.....\$ 41.75
 STATE SHARE IS 6/7, OR \$ 35.79
 (ITEM D, COL. 4, ABOVE)
 COUNTY SHARE IS 1/7, OR \$ 5.96
 (ITEM D, COL. 5, ABOVE)

FORM AG 802, REVISED OCTOBER 1, 1947
 RECAPITULATION SHEET TO ACCOMPANY
 PAYROLL (FORM AG 801)

FORM AG 802

629-99 (Continued)

629-99

Form Ag 800-H

STATE OF CALIFORNIA

FORWARD TWO COPIES TO THE
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIA

FROM XXX COUNTY
STATE AID FOR
CARE OF FORMER OAS RECIPIENTS IN COUNTY INSTITUTIONS
(AS PROVIDED UNDER SECTION 2160.7 OF THE WELFARE AND INSTITUTIONS CODE)
MONTH OF November, 1947 FISCAL YEAR
(DO NOT WRITE IN THIS SPACE)

	CURRENT MONTH COL. A	PRIOR MONTHS COL. B
1. TOTAL OF COLUMNS 3A & 4A (FORM AG 801-H).....	\$ 410.00	\$ 10.00
PERSONS: CURRENT MONTH <u>8</u> PRIOR MONTH <u>0</u>		
2. 6/7 BASIS FOR STATE SHARE (COL. 3B, FORM AG 801-H).....	\$ 52.50	\$ -0-
3. STATE SHARE (6/7 OF ITEM 2).....	\$ 45.00	\$ -0-
4. 5/6 BASIS FOR STATE SHARE (COL. 3B, FORM AG 801-H).....	\$ 43.33	\$ 10.00
5. STATE SHARE (5/6 OF ITEM 4).....	\$ 36.11	\$ 8.33
6. STATE SHARE NONCOUNTY CASES (COL. 4B, FORM AG 801-H).....	\$ 95.83	\$ -0-
7. STATE SHARE REGULAR & NONCOUNTY CASES (TOTAL, ITEMS 3, 5 & 6).....	\$ 176.94	\$ 8.33
8. LESS: STATE SHARE ADJUSTMENTS (COL. 8, FORM AGC 803).....	\$ -0-	
9. DUE FROM STATE FUNDS (ITEM 7 MINUS 8).....	\$ 176.94	
10. NET AMOUNT DUE FROM STATE FUNDS (ITEM 9, COL. A PLUS ITEM 7, COL. B).....		\$ 185.27

STATE OF CALIFORNIA, COUNTY OF XXX) ss.

I, Jane Doe, BEING DULY SWORN, DEPOSE AND SAY: THAT I AM THE CHAIRMAN OF THE BOARD OF SUPERVISORS OF THE AFORESAID COUNTY, AND THAT THE AUTHORITIES OF THIS COUNTY HAVE COMPLIED WITH ALL PROVISIONS OF CHAPTER 1 OF DIVISION III OF THE WELFARE AND INSTITUTIONS CODE, AND AMENDMENTS THERETO, UNDER WHICH THIS CLAIM IS FILED, TO THE BEST OF MY KNOWLEDGE AND BELIEF.

SUBSCRIBED AND SWORN TO BEFORE ME THIS 7th DAY
OF December, 1947

Mary Jones
TITLE Deputy County Clerk

Jane Doe
CHAIRMAN, BOARD OF SUPERVISORS

TITLE Deputy County Clerk

I HEREBY CERTIFY THAT THE RECORDS OF THIS COUNTY INDICATE THAT THE AMOUNTS CLAIMED ARE DUE AND OWING THE COUNTY FROM THE STATE OF CALIFORNIA UNDER SECTION 2160.7 OF THE WELFARE AND INSTITUTIONS CODE.

John Smith
SIGNATURE OF COUNTY AUDITOR

FORM AG 800-H, REVISED OCTOBER, 1947
AFFIDAVIT TO ACCOMPANY MONTHLY
COUNTY INSTITUTIONAL CLAIM (FORM AG 801-H)

CASH CLAIM-AID

(Section continued on next page)

629-99 (Continued)

629-99

Form ABC 803
Schedule to Accompany
Monthly Aid Claim

REPORT OF ADJUSTMENTS*

From XXXX County Age _____ Aid _____
To Accompany November 194 7, MONTHLY AID CLAIM

SUBMIT TWO COPIES TO
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO 14, CALIFORNIA

FORM ABC 803

(1) NAME OF PAYEE FAMILY GIVEN	(2) NAMES OF CHILDREN (FOR CHILDREN'S AID ONLY) FAMILY GIVEN	(3) STATE NUMBER	(4) PERIOD COVERED	(5) REASON	(6) TOTAL AMOUNT	(7) FEDERAL	(8) STATE	(9) COUNTY	(10) REMARKS
Dawson, Albert		1002	December 1946	Excess Income	20.00	5.00	12.50	2.50	(See Section 672-50, Distribution of Adjust- ments Example A.)

(Form Ag, B1 & CA 803 should be submitted for each repayment upon its receipt by the County and prior to its being reported on this schedule.)
* This form may be used for the reporting of collections by changing the above title to "Report of Collections."

Form ABC 803
Schedule to Accompany
Monthly Aid Claim

REPORT OF COLLECTIONS

From XXXX County Age _____ Aid _____
To Accompany November 194 7, MONTHLY AID CLAIM

SUBMIT TWO COPIES TO
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO 14, CALIFORNIA

FORM ABC 803

(1) NAME OF PAYEE FAMILY GIVEN	(2) NAMES OF CHILDREN (FOR CHILDREN'S AID ONLY) FAMILY GIVEN	(3) STATE NUMBER	(4) PERIOD COVERED	(5) REASON	(6) TOTAL AMOUNT	(7) FEDERAL	(8) STATE	(9) COUNTY	(10) REMARKS
Miller, George		2001	4/1/44-12/31/44	Voluntary	25.00	10.35	12.21	2.44	(See Section 673-25, Distribution of Collections Example A.)
Johnson, Maria		2452	10/1/46-12/31/46	"	115.00	64.13	42.38	8.49	(See Section 673-25, Distribution of Collections Example B.)
					140.00	74.48	54.59	10.93	

(Form Ag, B1 & CA 803 should be submitted for each repayment upon its receipt by the County and prior to its being reported on this schedule.)
* This form may be used for the reporting of collections by changing the above title to "Report of Collections."

Form Ag 804 (revised)—August, 1947

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
Cancellation Schedule to Accompany
Monthly Aged Claim

REPORT OF CANCELLED WARRANTS

From XXX County Age _____ Aid _____
To Accompany November 194 7, MONTHLY AID CLAIM

SUBMIT TWO COPIES TO
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIA

FORM Ag 804

(Indicate Non-County Cases by (*), Non-Federal Cases by (**), and
Non-County Non-Federal Cases by (***) in Column 7.)

(1) NAME FAMILY GIVEN	(2) STATE NUMBER	(3) WARRANT NUMBER	(4) WARRANT DATE	(5) MONTH AND YEAR CLAIMED	(6) WARRANT AMOUNT	(7) TOTAL	(8) EXCESS	(9) FEDERAL	(10) STATE	(11) COUNTY	(12) Do Not Write in This Column
Smith, Dick	2	863	7/1/47	7/47	55.00	*55.00	10.00				
Brown, Harry	3	872	7/1/47	7/47	55.00	55.00	10.00				
Conner, Brenda	6	896	7/1/47	7/47	50.00	**50.00					
Jones, Henry	11	632	5/1/47	5/47	12.00	12.00					
Williams, James	12	743	6/1/47	6/47	4.00	4.00					
RECAPITULATION:						176.00	176.00	20.00	63.00	99.17	13.83
						Regular	71.00	10.00	38.00	27.50	5.50
						Non-County	55.00	10.00	25.00	30.00	
						Non-Federal	50.00			41.67	8.33
Number of Eligible Persons <u>4</u>						176.00	20.00	63.00	99.17	13.83	

NOTE—Current cancellations should be crossed off payroll and not included in totals.
The breakdown into Federal and State amounts should be omitted in regular cases; i.e., when there is participation by Federal, State and County Governments.

Form Ag 804 (revised)—August, 1947

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
Cancellation Schedule to Accompany
Monthly Aged Claim

REPORT OF CANCELLED WARRANTS

From XXX County Age _____ Aid _____
To Accompany November 194 7, MONTHLY AID CLAIM

SUBMIT TWO COPIES TO
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIA

FORM Ag 804

(Indicate Non-County Cases by (*), Non-Federal Cases by (**), and
Non-County Non-Federal Cases by (***) in Column 7.)

(1) NAME FAMILY GIVEN	(2) STATE NUMBER	(3) WARRANT NUMBER	(4) WARRANT DATE	(5) MONTH AND YEAR CLAIMED	(6) WARRANT AMOUNT	(7) TOTAL	(8) EXCESS	(9) FEDERAL	(10) STATE	(11) COUNTY	(12) Do Not Write in This Column
Green, Hercules	5	985	8/1/47	8/47	60.00	60.00	15.00				
Green, Hercules	5	1010	9/1/47	9/47	60.00	60.00	15.00				
TOTAL						120.00	120.00	30.00	50.00	60.00	10.00
Brought Forward from Sheet #2						176.00	176.00	20.00	63.00	99.17	13.83
						296.00	296.00	50.00	113.00	159.17	23.83
Number of Eligible Persons <u>2</u>											

NOTE—Current cancellations should be crossed off payroll and not included in totals.
The breakdown into Federal and State amounts should be omitted in regular cases; i.e., when there is participation by Federal, State and County Governments.

(Section continued on next page)

629-99 (Continued)

629-99

Form BI 800

STATE OF CALIFORNIA

FORWARD TWO COPIES TO
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIA

AID AFFIDAVIT

FROM XXX COUNTY
FOR AID TO THE BLIND
MONTH OF November, 19 47 FISCAL YEAR
(STATE USE ONLY)

AMOUNT DUE FROM FEDERAL FUNDS FOR AID		CURRENT MONTH COLUMN A	PRIOR MONTHS COLUMN B
1. TOTAL AID PAID UNDER BLIND LAWS (ITEM F, COL. 1, FORM BL 802) NUMBER OF BLIND PERSONS: CURRENT MONTH <u>13</u> ; PRIOR MONTHS <u>4</u>		\$ 704.33	\$ 305.00
2. AMOUNT PAID TO BLIND PERSONS INELIGIBLE FOR FEDERAL AID (TOTAL ITEMS A, B & C COL. 1, FORM BL 802) NUMBER OF PERSONS: CURRENT MONTH <u>5</u> ; PRIOR MONTHS <u>4</u>		\$ 265.00	\$ 280.00
3. TOTAL AID IN EXCESS OF \$45 PAID TO BLIND PERSONS ELIGIBLE FOR FEDERAL AID (ITEM F, COL. 2, FORM BL 802).....		\$ 103.33	\$ 15.00
4. TOTAL OF ITEMS 2 AND 3.....		\$ 368.33	\$ 295.00
5. BASIS FOR FEDERAL PARTICIPATION (ITEM 1 MINUS ITEM 4).....		\$ 336.00	\$ 10.00
6. AMOUNT DUE FROM FEDERAL FUNDS FOR AID (ITEM F, COL. 3, FORM BL 802)....		\$ 188.00	\$ 5.00
7. FEDERAL SHARE OF ADJUSTMENTS (TOTAL COL. 7, FORM ABC 803).....		\$ 3.00	
8. FEDERAL SHARE OF CANCELED WARRANTS FOR PRIOR MONTHS (TOTAL COL. 9, FORM BL 804).....		\$ 95.00	
9. FEDERAL SHARE OF COLLECTIONS (TOTAL COL. 7, FORM ABC 803).....		\$ 10.00	
10. TOTAL OF ITEMS 7, 8, AND 9.....		\$ 108.00	
11. NET AMOUNT DUE FROM FEDERAL FUNDS FOR AID (ITEM 6 MINUS ITEM 10).....		\$ 80.00	
12. TOTAL AMOUNT DUE FROM FEDERAL FUNDS FOR AID (ITEM 11, COL. A, PLUS ITEM 6, COL. B).....		\$ 85.00	
AMOUNT DUE FROM STATE FUNDS FOR AID			
13. AMOUNT DUE FROM STATE FUNDS FOR AID (ITEM F, COL. 4, FORM BL 802)....		\$ 436.62	\$ 238.75
14. STATE SHARE OF ADJUSTMENTS (TOTAL COL. 8, FORM ABC 803).....		\$ 11.50	
15. STATE SHARE OF CANCELED WARRANTS FOR PRIOR MONTHS (TOTAL COL. 10, FORM BL 804).....		\$ 183.75	
16. STATE SHARE OF COLLECTIONS (TOTAL COL. 8, FORM ABC 803).....		\$ 7.00	
17. TOTAL OF ITEMS 14, 15, AND 16.....		\$ 207.25	
18. NET AMOUNT DUE FROM STATE FUNDS FOR AID (ITEM 13 MINUS ITEM 17).....		\$ 229.37	
19. TOTAL AMOUNT DUE FROM STATE FUNDS FOR AID (ITEM 18, COL. A, PLUS ITEM 13, COL. B).....		\$ 468.12	
AMOUNTS FOR REPORTING PURPOSES ONLY			
20. TOTAL ADJUSTMENTS (TOTAL COL. 6, FORM ABC 803).....		\$ 26.00	
21. TOTAL CANCELED WARRANTS FOR PRIOR MONTHS (TOTAL COL. 7, FORM BL 804).....		\$ 357.50	
22. TOTAL COLLECTIONS (TOTAL COL. 6, FORM ABC 803).....		\$ 24.00	

APPROVAL STAMP

STATE OF CALIFORNIA, COUNTY OF XXX SS. I, Jane Doe
BEING DULY SWORN, DEPOSE AND SAY: THAT I AM THE COUNTY OFFICIAL RESPONSIBLE FOR THE ADMINISTRATION OF AID TO THE
BLIND IN AND FOR THE SAID COUNTY; THAT ALL PROVISIONS OF CHAPTERS 1 AND 3 OF PART 1 OF DIVISION V OF THE WELFARE
AND INSTITUTIONS CODE, AND AMENDMENTS THERETO, AND TITLE X OF THE SOCIAL SECURITY ACT, AND AMENDMENTS THERETO,
HAVE BEEN COMPLIED WITH TO THE BEST OF MY KNOWLEDGE AND BELIEF.SUBSCRIBED AND SWORN TO BEFORE ME THIS 7th DAY January 19 47
SIGNATURE OF WELFARE DIRECTOR OR OFFICIAL IN CHARGE: Jane DoeOF December, 19 47TITLE Mary JonesTITLE Deputy County ClerkTITLE DirectorAPPROVED Richard Roe
CHAIRMAN, BOARD OF SUPERVISORSI HEREBY CERTIFY, THAT WARRANTS COVERING ALL AMOUNTS DUE UNDER THE LAWS HAVE BEEN ISSUED AND CHARGED TO
FUNDS FOR AID IN ACCORDANCE WITH THE BLIND LAWS, CHAPTERS 1 AND 3 OF PART 1 OF DIVISION V OF THE WELFARE AND
INSTITUTIONS CODE, AND AMENDMENTS THERETO.FORM BL 800, REVISED OCTOBER 1, 1947
AFFIDAVIT TO ACCOMPANY MONTHLY
PAYROLL (FORM BL 801)SIGNATURE OF COUNTY AUDITOR
John Smith

CREDIT VOUCHER CLAIM-AID

(Section continued on next page)

629-99 (Continued)

629-99

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
FORWARD TWO COPIES TO THE
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIA

CLAIM FOR STATE AID FOR CARE OF FORMER O.A.S. RECIPIENTS
IN COUNTY INSTITUTION

(AS PROVIDED UNDER SECTION 2160.7 OF THE WELFARE AND INSTITUTIONS CODE)

BY XXX COUNTY, CALIFORNIA Recipients entered
FOR THE MONTH OF November, 1947 hospital subsequent
to August 1, 1947
6/7 basis

1 NAME	2 STATE NUMBER	3 REGULAR CASES —A— BASIC FOR STATE SHARE —B—		4 NON-COUNTY CASES —A— BASIC FOR STATE SHARE —B—		5 DO NOT WRITE IN THIS SPACE
		TOTAL	AMOUNT OF OAS AGED PERSONS WERE RECEIVING AT TIME OF EN- TRANCE INTO COUNTY INSTI- TUTION.	TOTAL COL. 3A LESS FEDERAL SHARE AT TIME OF ENTRANCE. (SEE MANUAL OF POLICIES & PRO- CEDURES SEC. 627-25, COUNTY INSTITUTIONAL CLAIM.)	TOTAL COL. 3A LESS FEDERAL SHARE AT TIME OF ENTRANCE. (SEE MANUAL OF POLICIES & PRO- CEDURES SEC. 627-25, COUNTY INSTITUTIONAL CLAIM.)	
FAMILY	GIVEN					
KERR, Henry	15	60.00	35.00			
MESNER, Martin	16			60.00	35.00	
MARTY, John	17	40.00	17.50			
WELLS, Alex	18			40.00	17.50	
		100.00	52.50	100.00	52.50	

FORM AG 801-H

FORM AG 801-H, REVISED MARCH, 1957
CLAIM TO ACCOMPANY AFFIDAVIT (FORM AG 800-H)

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
FORWARD TWO COPIES TO THE
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIA

CLAIM FOR STATE AID FOR CARE OF FORMER O.A.S. RECIPIENTS
IN COUNTY INSTITUTION

(AS PROVIDED UNDER SECTION 2160.7 OF THE WELFARE AND INSTITUTIONS CODE)

BY XXX COUNTY, CALIFORNIA Recipients entered
FOR THE MONTH OF November, 1947 hospital prior to
August 1, 1947
5/6 Basis

1 NAME	2 STATE NUMBER	3 REGULAR CASES —A— BASIC FOR STATE SHARE —B—		4 NON-COUNTY CASES —A— BASIC FOR STATE SHARE —B—		5 DO NOT WRITE IN THIS SPACE
		TOTAL	AMOUNT OF OAS AGED PERSONS WERE RECEIVING AT TIME OF EN- TRANCE INTO COUNTY INSTI- TUTION.	TOTAL COL. 3A LESS FEDERAL SHARE AT TIME OF ENTRANCE. (SEE MANUAL OF POLICIES & PRO- CEDURES SEC. 627-25, COUNTY INSTITUTIONAL CLAIM.)	TOTAL COL. 3A LESS FEDERAL SHARE AT TIME OF ENTRANCE. (SEE MANUAL OF POLICIES & PRO- CEDURES SEC. 627-25, COUNTY INSTITUTIONAL CLAIM.)	
FAMILY	GIVEN					
MILLER, Selly	1	55.00	30.00			(See Example G, Sec. 627-25, County Institu- tional Claim.)
JONES, Stella	2			55.00	30.00	"
WILLIAMS, James	3	50.00	13.33			(See Example I, Sec. 627-25.)
ADAMS, Henry	4			50.00	13.33	"
		105.00	43.33	105.00	43.33	
SUPPLEMENT FOR PRIOR MONTH						
JULY, 1947						
MILLER, Selly	1	10.00	10.00			(See Sec. 626-50, Supplemental Aid Claims.)

FORM AG 801-H

FORM AG 801-H, REVISED MARCH, 1957
CLAIM TO ACCOMPANY AFFIDAVIT (FORM AG 800-H)

FORM BI 802

STATE OF CALIFORNIA
 RECAPITULATION SHEET
 FROM XXX COUNTY
 FOR AID TO THE BLIND
 MONTH OF November 1947
 (INCLUDE ONLY AID COVERING MONTHS AFTER OCTOBER 1, 1947)

FORWARD TWO COPIES TO THE
 STATE DEPARTMENT OF SOCIAL WELFARE
 SACRAMENTO, CALIFORNIA

SUPPLEMENT FOR PRIOR MONTHS

	COLUMN 1 TOTAL AID PAID UNDER THE BLIND LAWS (TOTAL COL. 1, FORM BI 801)	COLUMN 2 AMOUNT IN EXCESS OF \$45.00 IN FEDERAL CASES (TOTAL COL. 4, FORM BI 801)	COLUMN 3 FEDERAL SHARE	COLUMN 4 STATE SHARE	COLUMN 5 COUNTY SHARE
A) NONFEDERAL CASES - ANB TOTAL, COL. 1 STATE SHARE, COL. 4 (3/4 OF TOTAL) COUNTY SHARE, COL. 5 (1/4 OF TOTAL)	\$ 75.00			\$ 56.25	\$ 18.75
B) NONFEDERAL CASES - APBS TOTAL, COL. 1 STATE SHARE, COL. 4 (5/6 OF TOTAL) COUNTY SHARE, COL. 5 (1/6 OF TOTAL)	\$			\$	\$
C) NONFEDERAL-NONCOUNTY CASES TOTAL, COL. 1 STATE SHARE, COL. 4 (SAME AS COL. 1) ANB	\$ 75.00			\$ 75.00	
D) NONCOUNTY CASES TOTAL, COL. 1 EXCESS, COL. 2 FEDERAL SHARE, COL. 3 STATE SHARE, COL. 4 (SEE WORKSHEET BELOW FOR COMPUTATIONS)	\$ 115.00	\$ 30.00	\$ 47.50	\$ 67.50	
E) REGULAR CASES TOTAL, COL. 1 EXCESS, COL. 2 FEDERAL SHARE, COL. 3 STATE SHARE, COL. 4 COUNTY SHARE, COL. 5 (SEE WORKSHEET BELOW FOR COMPUTATIONS)	\$ 324.33	\$ 73.33	\$ 140.50	\$ 137.87	\$ 45.96
F) GRAND TOTALS (AMOUNTS TO BE CARRIED FORWARD TO AFFIDAVIT, FORM BI 800, AS NOTED)	\$ 704.33 (TO ITEM 1)	\$ 103.33 (TO ITEM 3)	\$ 188.00 (TO ITEM 6)	\$ 436.62 (TO ITEM 13)	\$ 79.71 (TO ITEM 23)

WORKSHEET FOR COMPUTING FEDERAL, STATE, & COUNTY SHARES ON NONCOUNTY AND REGULAR CASES

I NONCOUNTY CASES (ITEM D ABOVE)

FEDERAL SHARE
 TOTAL NONCOUNTY CASES (ITEM D, COL. 1).....\$ 115.00
 LESS: EXCESS ON NONCOUNTY CASES (ITEM D, COL. 2).....\$ 30.00
 EQUALS: TOTAL BASIS FOR FEDERAL PARTICIPATION.....\$ 85.00
 LESS: 2/3 BASIS FOR FEDERAL PARTICIPATION
 NUMBER 2 NONCOUNTY CASES ELIGIBLE FOR FEDERAL PARTICIPATION X \$15.....\$ 30.00
 BALANCE IS 1/2 BASIS FOR FEDERAL PARTICIPATION.....\$ 55.00
 TOTAL FEDERAL SHARE NONCOUNTY CASES.....\$ 47.50
 (ITEM D, COL. 3, ABOVE)

STATE SHARE
 TOTAL NONCOUNTY CASES.....(ITEM D, COL. 1).....\$ 115.00
 LESS: FEDERAL SHARE.....\$ 47.50
 EQUALS: STATE SHARE.....(ITEM D, COL. 4, ABOVE).....\$ 67.50

II REGULAR CASES (ITEM E ABOVE)

FEDERAL SHARE
 TOTAL REGULAR CASES (ITEM E, COL. 1).....\$ 324.33
 LESS: EXCESS ON REGULAR CASES (ITEM E, COL. 2).....\$ 73.33
 EQUALS: TOTAL BASIS FOR FEDERAL PARTICIPATION.....\$ 251.00
 LESS: 2/3 BASIS FOR FEDERAL PARTICIPATION
 NUMBER 6 REGULAR CASES ELIGIBLE FOR FEDERAL PARTICIPATION X \$15.....\$ 90.00
 BALANCE IS 1/2 BASIS FOR FEDERAL PARTICIPATION.....\$ 161.00
 TOTAL FEDERAL SHARE REGULAR CASES.....\$ 140.50
 (ITEM E, COL. 3, ABOVE)

STATE SHARE
 TOTAL REGULAR CASES.....(ITEM E, COL. 1).....\$ 324.33
 LESS: FEDERAL SHARE.....\$ 140.50
 EQUALS: BASIS FOR STATE AND COUNTY PARTICIPATION.....\$ 183.83
 STATE SHARE IS 3/4, OR \$ 137.87
 (ITEM E, COL. 4, ABOVE)
 COUNTY SHARE IS 1/4, OR \$ 45.96
 (ITEM E, COL. 5, ABOVE)

FORM BI 802, REVISED OCTOBER, 1947
 RECAPITULATION SHEET TO ACCOMPANY PAYROLL (FORM BI 801.)

FORM BI 802

STATE OF CALIFORNIA
 RECAPITULATION SHEET
 FROM XXX COUNTY
 FOR AID TO THE BLIND
 MONTH OF November 1947
 (INCLUDE ONLY AID COVERING MONTHS AFTER OCTOBER 1, 1947)

FORWARD TWO COPIES TO THE
 STATE DEPARTMENT OF SOCIAL WELFARE
 SACRAMENTO, CALIFORNIA

	COLUMN 1 TOTAL AID PAID UNDER THE BLIND LAWS (TOTAL COL. 1, FORM BI 801)	COLUMN 2 AMOUNT IN EXCESS OF \$45.00 IN FEDERAL CASES (TOTAL COL. 4, FORM BI 801)	COLUMN 3 FEDERAL SHARE	COLUMN 4 STATE SHARE	COLUMN 5 COUNTY SHARE
A) NONFEDERAL CASES - ANB TOTAL, COL. 1 STATE SHARE, COL. 4 (3/4 OF TOTAL) COUNTY SHARE, COL. 5 (1/4 OF TOTAL)	\$ 25.00			\$ 18.75	\$ 6.25
B) NONFEDERAL CASES - APBS TOTAL, COL. 1 STATE SHARE, COL. 4 (5/6 OF TOTAL) COUNTY SHARE, COL. 5 (1/6 OF TOTAL)	\$ 165.00			\$ 137.50	\$ 27.50
C) NONFEDERAL-NONCOUNTY CASES TOTAL, COL. 1 STATE SHARE, COL. 4 (SAME AS COL. 1) ANB	\$ 75.00			\$ 75.00	
D) NONCOUNTY CASES TOTAL, COL. 1 EXCESS, COL. 2 FEDERAL SHARE, COL. 3 STATE SHARE, COL. 4 (SEE WORKSHEET BELOW FOR COMPUTATIONS)	\$ 115.00	\$ 30.00	\$ 47.50	\$ 67.50	
E) REGULAR CASES TOTAL, COL. 1 EXCESS, COL. 2 FEDERAL SHARE, COL. 3 STATE SHARE, COL. 4 COUNTY SHARE, COL. 5 (SEE WORKSHEET BELOW FOR COMPUTATIONS)	\$ 324.33	\$ 73.33	\$ 140.50	\$ 137.87	\$ 45.96
F) GRAND TOTALS (AMOUNTS TO BE CARRIED FORWARD TO AFFIDAVIT, FORM BI 800, AS NOTED)	\$ 704.33 (TO ITEM 1)	\$ 103.33 (TO ITEM 3)	\$ 188.00 (TO ITEM 6)	\$ 436.62 (TO ITEM 13)	\$ 79.71 (TO ITEM 23)

WORKSHEET FOR COMPUTING FEDERAL, STATE, & COUNTY SHARES ON NONCOUNTY AND REGULAR CASES

I NONCOUNTY CASES (ITEM D ABOVE)

FEDERAL SHARE
 TOTAL NONCOUNTY CASES (ITEM D, COL. 1).....\$ 115.00
 LESS: EXCESS ON NONCOUNTY CASES (ITEM D, COL. 2).....\$ 30.00
 EQUALS: TOTAL BASIS FOR FEDERAL PARTICIPATION.....\$ 85.00
 LESS: 2/3 BASIS FOR FEDERAL PARTICIPATION
 NUMBER 2 NONCOUNTY CASES ELIGIBLE FOR FEDERAL PARTICIPATION X \$15.....\$ 30.00
 BALANCE IS 1/2 BASIS FOR FEDERAL PARTICIPATION.....\$ 55.00
 TOTAL FEDERAL SHARE NONCOUNTY CASES.....\$ 47.50
 (ITEM D, COL. 3, ABOVE)

STATE SHARE
 TOTAL NONCOUNTY CASES.....(ITEM D, COL. 1).....\$ 115.00
 LESS: FEDERAL SHARE.....\$ 47.50
 EQUALS: STATE SHARE.....(ITEM D, COL. 4, ABOVE).....\$ 67.50

II REGULAR CASES (ITEM E ABOVE)

FEDERAL SHARE
 TOTAL REGULAR CASES (ITEM E, COL. 1).....\$ 324.33
 LESS: EXCESS ON REGULAR CASES (ITEM E, COL. 2).....\$ 73.33
 EQUALS: TOTAL BASIS FOR FEDERAL PARTICIPATION.....\$ 251.00
 LESS: 2/3 BASIS FOR FEDERAL PARTICIPATION
 NUMBER 6 REGULAR CASES ELIGIBLE FOR FEDERAL PARTICIPATION X \$15.....\$ 90.00
 BALANCE IS 1/2 BASIS FOR FEDERAL PARTICIPATION.....\$ 161.00
 TOTAL FEDERAL SHARE REGULAR CASES.....\$ 140.50
 (ITEM E, COL. 3, ABOVE)

STATE SHARE
 TOTAL REGULAR CASES.....(ITEM E, COL. 1).....\$ 324.33
 LESS: FEDERAL SHARE.....\$ 140.50
 EQUALS: BASIS FOR STATE AND COUNTY PARTICIPATION.....\$ 183.83
 STATE SHARE IS 3/4, OR \$ 137.87
 (ITEM E, COL. 4, ABOVE)
 COUNTY SHARE IS 1/4, OR \$ 45.96
 (ITEM E, COL. 5, ABOVE)

FORM BI 802, REVISED OCTOBER, 1947
 RECAPITULATION SHEET TO ACCOMPANY PAYROLL (FORM BI 801)

(Section continued on next page)

STATE OF CALIFORNIA

Forward TWO copies to the
State Department of Social Welfare
Sacramento

CLAIM FOR FEDERAL AND STATE AID TO THE BLIND

PAID BY XXX COUNTY

Month of November, 1947

WARRANTS DATED
November 1, 1947

83493-A 9-40 134 (Indicate Non-County Cases by (*), Non-Federal Cases by (**) and Non-County Non-Federal Cases by (***) in Column 3)

1	2	3	4	5	6	7	8
NAME	STATE NUMBER	TOTAL AID PAID UNDER THE BLIND LAWS	AMOUNT IN EXCESS OF \$45 ON FEDERAL CASES	FEDERAL SHARE NON-COUNTY CASES	STATE SHARE NON-COUNTY AND NON-FEDERAL CASES (Completion of Columns 5 and 6 Optional)	DO NOT WRITE IN THIS SPACE	WARRANT NUMBER
JONES, Thomas	1	75.00	30.00			(SEE SEC. 27-20, APPOINTMENTING OF GRANTS ON PAY ROLLS OR CLAIMS.)	100
BROWN, Helen	2	52.50	7.50				101
WHITE, John	3	*75.00	30.00				102
REDSTONE, Peter	4	50.00	5.00				103
CRABBE, Wm.	6	*40.00					104
BLACK, Edward	8	75.00	30.00				105 11/17/47
STONE, Edwin	9	**25.00					109 11/17/47
WHEELER, James	10	45.83	.83			(SEE EXAMPLE B, SEC. 627-45, PARTIAL MONTHS' CLAIMS - BASES FOR STATE AND FEDERAL PARTICIPATION.)	110 11/17/47
WRIGHT, Frank	12	26.00				(SEE EXAMPLE J, SEC. 627-25, COUNTY INSTITUTIONAL CLAIM.)	112 11/19/47
		464.33	103.33				
APSB CASES							
BRAMMER, Leon	5	***75.00					106
SMITH, Harold	7	**47.50					107
CECIL, John	11	**42.50				(SEE EXAMPLE C, SEC. 627-45, PARTIAL MONTHS' CLAIMS - BASES FOR STATE AND FEDERAL PARTICIPATION.)	111 11/17/47
JOHNSON, William	13	**75.00					108
		240.00					
Total number of persons on this page							
8 eligible 5 ineligible to Federal							
(Warrants covering increases not to be counted in number of persons)							

Form BI 801

Page No. 1

STATE OF CALIFORNIA

Forward TWO copies to the
State Department of Social Welfare
Sacramento

CLAIM FOR FEDERAL AND STATE AID TO THE BLIND

PAID BY XXX COUNTY

Month of November, 1947

WARRANTS DATED
See Column 8

83493-A 9-40 134 (Indicate Non-County Cases by (*), Non-Federal Cases by (**) and Non-County Non-Federal Cases by (***) in Column 3)

1	2	3	4	5	6	7	8
NAME	STATE NUMBER	TOTAL AID PAID UNDER THE BLIND LAWS	AMOUNT IN EXCESS OF \$45 ON FEDERAL CASES	FEDERAL SHARE NON-COUNTY CASES	STATE SHARE NON-COUNTY AND NON-FEDERAL CASES (Completion of Columns 5 and 6 Optional)	DO NOT WRITE IN THIS SPACE	WARRANT NUMBER
						MAY, 1947	
BROWN, Helen	2	** 5.00				(CASE #2 REPRESENTS APPEAL TO SWS FOR RETROACTIVE AND INCREASE FROM 37.50 TO 42.50 MAY AND JUNE 1947 AND INCREASE FROM 42.50 TO 52.50 JULY AND AUGUST 1947. APPEAL SIGNED AUGUST 5, 1947.)	101 11/1/47
						JUNE, 1947	
BROWN, Helen	2	5.00					101 11/1/47
						JULY, 1947	
BROWN, Helen	2	10.00	7.50				101 11/1/47
						AUGUST, 1947	
BROWN, Helen	2	10.00	7.50				101 11/1/47
						SEPTEMBER, 1947	
BLACK, Edward	8	**60.00				(CASE #6 REPRESENTS RETROACTIVE AID PAID UNDER THE 90 DAY LAW.)	105 11/17/47
						OCTOBER, 1947	
Black, Edward	8	**75.00					105 11/17/47
APSB CASES							
						SEPTEMBER, 1947	
BRAMMER, Leon	5	***65.00				(CASE #8 REPRESENTS RETROACTIVE AID PAID UNDER THE 90 DAY LAW.)	109 11/1/47
						OCTOBER, 1947	
BRAMMER, Leon	5	***75.00					109 11/1/47
Total number of persons on this page							
0 eligible 2 ineligible to Federal							
(Warrants covering increases not to be counted in number of persons)							

NOTE: Individual warrants for each month or one warrant covering all months for each case may be issued, the amount paid for each month to be reported separately.

Form BI 801

Page No. 2

FORM ABC 803
Form ABC 803
(Schedule to Accompany
Monthly Blind Claim)

REPORT OF ADJUSTMENTS*

FROM XXXX COUNTY

Blind Aid
To ACCOMPANY November 1947, MONTHLY AID CLAIM

SUBMIT TWO COPIES TO
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO 14, CALIFORNIA

(1) NAME OF PAYEE FAMILY GIVEN	(2) NAMES OF CHILDREN (FOR CHILDREN'S AID ONLY) FAMILY GIVEN	(3) STATE NUMBER	(4) PERIOD COVERED	(5) REASON	(6) TOTAL AMOUNT	(7) FEDERAL	(8) STATE	(9) COUNTY	(10) REMARKS
Brown, Helen		2	March 1947	Responsible Relative	\$26.00	3.00	11.50	11.50	(See Section 672-50, Distribution of Adjustments, Example C.)

(Form Ag, BI & CA 808 should be submitted for each payment upon its receipt by the County and prior to its being reported on this schedule.)
* This form may be used for the reporting of collections by changing the above title to "Report of Collections."

FORM ABC 803
Form ABC 803
(Schedule to Accompany
Monthly Blind Claim)

REPORT OF ADJUSTMENTS*

FROM XXXX COUNTY

Blind Aid
To ACCOMPANY November 1947, MONTHLY AID CLAIM

SUBMIT TWO COPIES TO
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO 14, CALIFORNIA

(1) NAME OF PAYEE FAMILY GIVEN	(2) NAMES OF CHILDREN (FOR CHILDREN'S AID ONLY) FAMILY GIVEN	(3) STATE NUMBER	(4) PERIOD COVERED	(5) REASON	(6) TOTAL AMOUNT	(7) FEDERAL	(8) STATE	(9) COUNTY	(10) REMARKS
Jones, Thomas		1	October 1, 1946- October 31, 1946	Voluntary Repayment	24.00	10.00	7.00	7.00	(See Section 673-25, Distribution of Collections.)

(Form Ag, BI & CA 808 should be submitted for each payment upon its receipt by the County and prior to its being reported on this schedule.)
* This form may be used for the reporting of collections by changing the above title to "Report of Collections."

FORM BI 804 (revised)—August, 1947
Form BI 804 (revised)
(Schedule to Accompany
Monthly Blind Claim)

REPORT OF CANCELLED WARRANTS

FROM XXX COUNTY

FOR AID TO THE BLIND
To ACCOMPANY November 1947, MONTHLY BLIND CLAIM

SUBMIT TWO COPIES TO
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIA

(Indicate Non-County Cases by (*), Non-Federal Cases by (**), and Non-County Non-Federal Cases by (***) in Column 7.)

(1) NAME FAMILY GIVEN	(2) STATE NUMBER	(3) WARRANT NUMBER	(4) WARRANT DATE	(5) MONTH AND YEAR CLAIMED	(6) WARRANT AMOUNT	(7) TOTAL	(8) EXCESS	(9) FEDERAL	(10) STATE	(11) COUNTY	(12) Do Not Write in This Column
Jones, Thomas	1	80	10/1/47	10/47	75.00	75.00	30.00	25.00	37.50	12.50	
APSR CASES											
Johnson, Wm.	13	85	10/1/47	10/47	75.00	**75.00			62.50	12.50	
Number of Eligible Persons <u>1</u>						150.00	30.00	25.00	100.00	25.00	
Brought forward from sheet #2						207.50	40.00	70.00	86.75	46.75	
						357.50	70.00	95.00	166.75	73.75	

NOTE.—Current cancellations should be crossed off payroll and not included in totals.
The breakdown into Federal and State amounts should be omitted in regular cases; i.e., when there is participation by Federal, State and County Governments.

FORM BI 804 (revised)—August, 1947
Form BI 804 (revised)
(Schedule to Accompany
Monthly Blind Claim)

REPORT OF CANCELLED WARRANTS

FROM XXX COUNTY

FOR AID TO THE BLIND
To ACCOMPANY November 1947, MONTHLY BLIND CLAIM

SUBMIT TWO COPIES TO
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIA

(Indicate Non-County Cases by (*), Non-Federal Cases by (**), and Non-County Non-Federal Cases by (***) in Column 7.)

(1) NAME FAMILY GIVEN	(2) STATE NUMBER	(3) WARRANT NUMBER	(4) WARRANT DATE	(5) MONTH AND YEAR CLAIMED	(6) WARRANT AMOUNT	(7) TOTAL	(8) EXCESS	(9) FEDERAL	(10) STATE	(11) COUNTY	(12) Do Not Write in This Column
Jones, Thomas	1	55	9/1/47	9/47	65.00	65.00	20.00				
White, John	3	62	9/1/47	9/47	65.00	*65.00	20.00				
Smith, Harold	7	67	9/1/47	9/47	47.50	**47.50					
Wheeler, James	10	845	6/1/47	6/47	25.00	25.00					
Cecil, John	11	751	5/1/47	5/47	5.00	5.00					
TOTAL						207.50	207.50	40.00	70.00	86.75	46.75
Recapitulation:						Regular	95.00	20.00	45.00	25.00	25.00
						Non-County	65.00	20.00	25.00	40.00	
						Non-Federal	47.50		23.75	23.75	
Number of Eligible Persons <u>3</u>						207.50	40.00	70.00	86.75	46.75	

NOTE.—Current cancellations should be crossed off payroll and not included in totals.
The breakdown into Federal and State amounts should be omitted in regular cases; i.e., when there is participation by Federal, State and County Governments.

(Section Continued on Next Page)

(Section continued on next page)

629-99 (Continued)

629-99

STATE OF CALIFORNIA

RECAPITULATION SHEET

FROM XXX COUNTY

FOR AID TO THE BLIND

MONTH OF November, 1947

SUPPLEMENT FOR MONTHS PRIOR TO OCTOBER 1, 1947

FORM BL 802

(INCLUDE ONLY AID COVERING MONTHS AFTER OCTOBER 1, 1946)

	COLUMN 1 TOTAL AID PAID UNDER THE BLIND LAWS (TOTAL COL. 3, FORM BL 801)	COLUMN 2 AMOUNT IN EXCESS OF \$15.00 IN FEDERAL CASES (TOTAL COL. 4, FORM BL 801)	COLUMN 3 FEDERAL SHARE	COLUMN 4 STATE SHARE	COLUMN 5 COUNTY SHARE
A) NONFEDERAL CASES TOTAL, COL. 1 STATE SHARE, COL. 4 (1/2 OF TOTAL) COUNTY SHARE, COL. 5 (1/2 OF TOTAL)	\$ 65.00			\$ 32.50	\$ 32.50
B) NONFEDERAL-NONCOUNTY CASES TOTAL, COL. 1 STATE SHARE COL. 4 (SAME AS COL. 1)	\$ 65.00			\$ 65.00	
C) NONCOUNTY CASES TOTAL, COL. 1 EXCESS, COL. 2 FEDERAL SHARE, COL. 3 STATE SHARE, COL. 4 (SEE WORKSHEET BELOW FOR COMPUTATIONS)	\$	\$	\$	\$	
D) REGULAR CASES TOTAL, COL. 1 EXCESS, COL. 2 FEDERAL SHARE, COL. 3 STATE SHARE, COL. 4 COUNTY SHARE, COL. 5 (SEE WORKSHEET BELOW FOR COMPUTATIONS)	\$ 25.00	\$ 15.00	\$ 5.00	\$ 10.00	\$ 10.00
E) GRAND TOTALS (AMOUNTS TO BE CARRIED FORWARD TO AFFIDAVIT, FORM BL 800, AS NOTED)	\$ 155.00 (TO ITEM 1)	\$ 15.00 (TO ITEM 3)	\$ 5.00 (TO ITEM 6)	\$ 107.50 (TO ITEM 11)	\$ 42.50 (TO ITEM 23)

WORKSHEET FOR COMPUTING FEDERAL, STATE, & COUNTY SHARES ON NONCOUNTY AND REGULAR CASES

I NONCOUNTY CASES (ITEM C, ABOVE)

FEDERAL SHARE
TOTAL NONCOUNTY CASES (ITEM C, COL. 1).....\$

LESS: EXCESS ON NONCOUNTY CASES (ITEM C, COL. 2).....\$

EQUALS: TOTAL BASIS FOR FEDERAL PARTICIPATION.....\$

LESS: 2/3 BASIS FOR FEDERAL PARTICIPATION
NONCOUNTY CASES ELIGIBLE FOR FEDERAL
PARTICIPATION X \$15).....\$ FED. SHARE IS 2/3, OR \$

BALANCE IS 1/2 BASIS FOR FEDERAL PARTICIPATION.....\$ FED. SHARE IS 1/2, OR \$

TOTAL FEDERAL SHARE NONCOUNTY CASES.....\$ (ITEM C, COL. 3, ABOVE)

STATE SHARE
TOTAL NONCOUNTY CASES.....(ITEM C, COL. 1).....\$

LESS: FEDERAL SHARE.....\$

EQUALS: STATE SHARE.....(ITEM C, COL. 4, ABOVE).....\$

II REGULAR CASES (ITEM D ABOVE)

FEDERAL SHARE
TOTAL REGULAR CASES (ITEM D, COL. 1).....\$ 25.00

LESS: EXCESS ON REGULAR CASES (ITEM D, COL. 2).....\$ 15.00

EQUALS: TOTAL BASIS FOR FEDERAL PARTICIPATION.....\$ 10.00

LESS: 2/3 BASIS FOR FEDERAL PARTICIPATION
REGULAR CASES ELIGIBLE FOR FEDERAL
PARTICIPATION X \$5).....\$ -0- FED. SHARE IS 2/3, OR \$ -0-

BALANCE IS 1/2 BASIS FOR FEDERAL PARTICIPATION.....\$ 10.00 FED. SHARE IS 1/2, OR \$ 5.00

TOTAL FEDERAL SHARE REGULAR CASES.....\$ 5.00 (ITEM D, COL. 3, ABOVE)

STATE SHARE
TOTAL REGULAR CASES.....(ITEM D, COL. 1).....\$ 25.00

LESS: FEDERAL SHARE.....\$ 5.00

EQUALS: BASIS FOR STATE AND COUNTY PARTICIPATION.....\$ 20.00

STATE SHARE IS 1/2, OR \$ 10.00 (ITEM D, COL. 4, ABOVE)

COUNTY SHARE IS 1/2, OR \$ 10.00 (ITEM D, COL. 5, ABOVE)

FORM BL 802, REVISED MARCH, 1947
RECAPITULATION SHEET TO ACCOMPANY PAYROLL (FORM BL 801.)

(Section continued on next page)

629-99 (Continued)

629-99

FORM B1 801-H STATE OF CALIFORNIA

DEPARTMENT OF SOCIAL WELFARE

FORWARD TWO COPIES TO THE
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIACLAIM FOR STATE AID FOR CARE OF FORMER ANB RECIPIENTS
IN COUNTY INSTITUTION

(AS PROVIDED UNDER SECTION 3044.1 OF THE WELFARE AND INSTITUTIONS CODE)

BY XXX COUNTY, CALIFORNIA
FOR THE MONTH OF November, 1947Recipients entered
hospital prior to
October 1, 1947

1 NAME	2 STATE- NUMBER	3 REGULAR CASES		4 NON-COUNTY CASES		5
		-A-	-B-	-A-	-B-	
		<u>TOTAL</u>	<u>BASIS FOR STATE SHARE</u>	<u>TOTAL</u>	<u>STATE SHARE</u>	
		AMOUNT OF ANB PERSON WAS RE- CEIVING AT TIME OF EN- TRANCE TO COUNTY INSTI- TUTION.	TOTAL COL. 3A LESS FEDERAL SHARE AT TIME OF ENTRANCE. (SEE MANUAL OF POLICIES & PROCEDURES SEC. 627-25 COUNTY INSTI- TUTIONAL CLAIM.)	AMOUNT OF ANB PERSON WAS RECEIVING AT TIME OF EN- TRANCE TO COUNTY INSTI- TUTION.	TOTAL COL. 4A LESS FEDERAL SHARE AT TIME OF ENTRANCE. (SEE MANUAL OF POLICIES & PROCEDURES SEC. 627-25 COUNTY INSTI- TUTIONAL CLAIM.)	DO NOT WRITE IN THIS SPACE
FAMILY	GIVEN					
BROWN, George	1	65.00	40.00			(SEE EXAMPLE H, SEC. 627-25, COUNTY INST. CLAIM.)
NIX, Florence	2			65.00	40.00	
WRIGHT, Frank	3	55.00	18.00			(SEE EXAMPLE J, SEC. 627-25.)
FROST, Helen	4			55.00	18.00	
		120.00	58.00	120.00	58.00	
SUPPLEMENT FOR PRIOR MONTH						
SEPTEMBER, 1947						
BROWN, George	1	10.00	10.00			(SEE SEC. 626-50 SUPPLEMENTAL AID CLAIMS.) THIS C ILLUSTRATES RET ACTIVE AID TO C UNDER CLAIM FOR PRIOR MONTH.

FORM B1 801H-REVISED FEB. 1947
CLAIM TO ACCOMPANY AFFIDAVIT
(FORM B1 800-H)

(Section continued on next page)

629-99 (Continued)

629-99

Form Bl 800-H

STATE OF CALIFORNIA

FORWARD TWO COPIES TO THE
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIAFROM XXX COUNTY
STATE AID FOR
CARE OF FORMER AND RECIPIENTS IN COUNTY INSTITUTION
(AS PROVIDED UNDER SECTION 3044.1 OF THE WELFARE AND INSTITUTIONS CODE)
MONTH OF November, 1947 FISCAL YEAR
(DO NOT WRITE IN THIS SPACE)

	CURRENT MONTH COL. A	PRIOR MONTHS COL. B
1. TOTAL OF COLUMNS 3A & 4A (FORM BL 801-H).....	\$ 240.00	\$ 10.00
PERSONS: CURRENT MONTH <u>4</u> PRIOR MONTHS <u>0</u>		
2. $\frac{3}{4}$ BASIS FOR STATE SHARE (COL. 3B, FORM BL 801-H).....	\$ -0-	\$ -0-
3. STATE SHARE ($\frac{3}{4}$ OF ITEM 2).....	\$ -0-	\$ -0-
4. $\frac{1}{2}$ BASIS FOR STATE SHARE (COL. 3B, FORM BL 801-H).....	\$ 58.00	\$ 10.00
5. STATE SHARE ($\frac{1}{2}$ OF ITEM 4).....	\$ 29.00	\$ 5.00
6. STATE SHARE NONCOUNTY CASES (COL. 4B, FORM BL 801-H).....	\$ 58.00	\$ -0-
7. STATE SHARE REGULAR & NONCOUNTY CASES (TOTAL, ITEMS 5, 6 & 6).....	\$ 87.00	\$ 5.00
8. LESS: STATE SHARE ADJUSTMENTS (COL. 8, FORM ABC 803).....	\$ -0-	
9. DUE FROM STATE FUNDS (ITEM 7 MINUS 8).....	\$ 87.00	
10. NET AMOUNT DUE FROM STATE FUNDS (ITEM 9, COL. A PLUS ITEM 7, COL. B).....		\$ 92.00

STATE OF CALIFORNIA, COUNTY OF XXX)ss.I, Jane Doe, BEING DULY SWORN, DEPOSE AND SAY: THAT I AM THE CHAIRMAN OF
THE BOARD OF SUPERVISORS OF THE AFORESAID COUNTY, AND THAT THE AUTHORITIES OF THIS COUNTY HAVE COMPLIED WITH
ALL PROVISIONS OF CHAPTER 1 OF PART 1 OF DIVISION V OF THE WELFARE AND INSTITUTIONS CODE, AND AMENDMENTS
THERE TO, UNDER WHICH THIS CLAIM IS FILED, TO THE BEST OF MY KNOWLEDGE AND BELIEF.SUBSCRIBED AND SWORN TO BEFORE ME THIS 7th DAYOF December, 1947Mary JonesTITLE Deputy County ClerkJane Doe
CHAIRMAN, BOARD OF SUPERVISORSI HEREBY CERTIFY THAT THE RECORDS OF THIS COUNTY INDICATE THAT THE AMOUNTS CLAIMED ARE DUE AND OWING
THE COUNTY FROM THE STATE OF CALIFORNIA UNDER SECTION 3044.1 OF THE WELFARE AND INSTITUTIONS CODEJohn Smith
SIGNATURE OF COUNTY AUDITORFORM BL 800-H, REVISED OCT. 1947
AFFIDAVIT TO ACCOMPANY MONTHLY
COUNTY INSTITUTIONAL CLAIM
(FORM BL 801-H)

CASH CLAIM-AID

(Section continued on next page)

629-99 (Continued)

629-99

FORM CA 801

FORM CA-801—Revised October 1, 1946
STATE OF CALIFORNIA
Payroll to accompany affidavit Form CA-800Forward TWO copies to
STATE DEPARTMENT OF SOCIAL WELFARE
Sacramento, CaliforniaWarrants Dated December 1, 1947

(Except as otherwise shown in Column 7)

CLAIM FOR FEDERAL AND STATE AID TO NEEDY CHILDREN

(Excluding aid paid under Section 1556.5 of the Welfare and Institutions Code)

Paid by XXX CountyMonth of December, 1947

(INDICATE NON-COUNTY CASES BY (*) IN COLUMNS 5 AND 6)

(1) STATE NUMBER	(2) NAMES OF PAYEE NAMES OF CHILDREN FAMILY GIVEN	(3) NO. OF CHILDREN		(4) WARRANT AMOUNT	(5) BASIS FOR STATE PARTICIPATION		(6) BASIS FOR FEDERAL PARTICI- PATION	(7) REMARKS	(8) WARRANT NUMBER
		(A) EL.	(B) INEL.		(A) EL. TO FEDERAL	(B) INEL. TO FEDERAL			
1	James Blake Blake, Arthur Myrtle John	2	1	175.50	130.50	36.00	39.00	(SEE SEC. 627-20, APPORTIONMENT OF GRANTS ON PAY ROLLS OR CLAIMS - ANC, ITEM A)	500
2	Elizabeth White Smith, Andrew Harry Jean	2	1	100.00	66.67	33.33	39.00	" (ITEM B)	501
3	Cynthia Brown Brown, Doris Aleta Henry Florence Bruce	3	2	60.00	54.00	6.00	54.00	" (ITEM C)	502
4	Rose Johnson Black, Robert James Fred Johnson, Lola Alice	3	2	110.00	50.00	60.00	50.00	" (ITEM D)	503
5	Sarah White White, Floyd Jack Arlene Robert	3	1	148.00	112.00	36.00	54.00	" (ITEM E), AND SEC. 627-90, TWO OR MORE FAMILY BUDGET UNITS IN ONE HOUSEHOLD.)	504
6	Ida Allen Allen, Helen Mabel Sally Lawrence	4		130.50	130.50		69.00	(SEE SEC. 627-20, APPORTIONMENT OF GRANTS ON PAY ROLLS OR CLAIMS - ANC, ITEM F; AND SEC. 627-90, TWO OR MORE FAMILY BUDGET UNITS IN ONE HOUSEHOLD.)	505
7	John Robert Robert, Joan* Susan William	2	1	175.50	*45.00 85.50	36.00	*15.00 24.00	(SEE SEC. 627-20, APPORTIONMENT OF GRANTS ON PAY ROLLS OR CLAIMS - ANC, AND SEC. 627-30, FEDERAL PARTICIPA- TION.)	506
8	Alice Hicks Hicks, John	1		64.50	64.50		24.00	(SEE EXAMPLE D, SEC. 627-50, COMPU- TATION OF PAYMENTS WHEN CHILD TRANSFERS BETWEEN A PRIVATE HOME AND BOARDING HOME OR INSTITUTION.)	507
9	Mary French French, Elsie	1		10.65	10.65		10.65	" (EXAMPLE E)	508

Total number of children on this page eligible 21 ineligible 6

(Supplemental warrants covering increases for children already counted on the current payroll or previous months' payrolls not to be included in the total number of children)

Page No. 1

(Section continued on next page)

629-99 (Continued)

629-99

FORM CA 800

STATE OF CALIFORNIA

AID AFFIDAVIT

FROM XXX COUNTY
FOR NEEDY CHILDRENFORWARD TWO COPIES TO
STATE DEPARTMENT OF SOCIAL
WELFARE
SACRAMENTO, CALIFORNIA

(EXCLUDING AID PAID UNDER SECTION 1556.5 OF THE WELFARE AND INSTITUTIONS CODE)

MONTH OF December, 19 47 FISCAL YEAR
(STATE USE ONLY)

AMOUNT DUE FROM FEDERAL FUNDS FOR AID		CURRENT MONTH COLUMN A	PRIOR MONTHS COLUMN B
1. TOTAL BASIS FOR STATE PARTICIPATION (ITEM B, FORM CA 802) NUMBER OF CHILDREN: CURRENT MONTH <u>51</u> ; PRIOR MONTHS <u>6</u>		\$ 1,680.26	\$ 377.00
2. TOTAL FOR CHILDREN INELIGIBLE FOR FEDERAL AID (ITEM C, FORM CA 802) NUMBER OF CHILDREN: CURRENT MONTH <u>10</u> ; PRIOR MONTH <u>6</u>		\$ 284.20	\$ 288.00
3. TOTAL FOR CHILDREN ELIGIBLE FOR FEDERAL AID (ITEM 1 MINUS ITEM 2) (ITEM D, FORM CA 802) NUMBER OF CHILDREN: CURRENT MONTH <u>41</u> ; PRIOR MONTH <u>0</u>		\$ 1,396.06	\$ 89.00
4. LESS: EXPENDITURES IN EXCESS OF \$24 FOR ONE ELIGIBLE CHILD AND \$15 FOR EACH ADDITIONAL ELIGIBLE CHILD IN SAME HOUSEHOLD GROUP (ITEM D MINUS ITEM P, COLUMNS 2A PLUS 2B, FORM CA 802)		\$ 689.67	\$ 81.00
5. BASIS FOR FEDERAL PARTICIPATION (ITEM 3 MINUS ITEM 4) (ITEM P, COLUMNS 2A PLUS 2B, FORM CA 802)		\$ 706.39	\$ 8.00
6. AMOUNT DUE FROM FEDERAL FUNDS FOR AID (ITEM P, COLUMN 3, FORM CA 802)		\$ 414.69	\$ 4.00
7. FEDERAL SHARE OF ADJUSTMENTS (TOTAL COLUMN 7, FORM ABC 803)	\$ 3.25		
8. FEDERAL SHARE OF CANCELLED WARRANTS FOR PRIOR MONTHS (TOTAL COLUMN 9, FORM CA 804)	\$ 67.50		
9. FEDERAL SHARE OF COLLECTIONS (TOTAL COLUMN 7, FORM ABC 803)	\$ 3.75		
10. TOTAL OF ITEMS 7, 8, AND 9		\$ 74.50	
11. NET AMOUNT DUE FROM FEDERAL FUNDS FOR AID (ITEM 6 MINUS ITEM 10)		\$ 340.19	
12. TOTAL AMOUNT DUE FROM FEDERAL FUNDS FOR AID (ITEM 11, COL. A PLUS ITEM 6, COL. B)		\$ 344.19	

AMOUNT DUE FROM STATE FUNDS FOR AID		CURRENT MONTH	PRIOR MONTHS
13. AMOUNT DUE FROM STATE FUNDS FOR AID (ITEM P, COLUMN 4, FORM CA 802)		\$ 855.71	\$ 272.67
14. STATE SHARE OF ADJUSTMENTS (TOTAL COLUMN 8, FORM ABC 803)	\$ 21.17		
15. STATE SHARE OF CANCELLED WARRANTS FOR PRIOR MONTHS (TOTAL COLUMN 10, FORM CA 804)	\$ 240.00		
16. STATE SHARE OF COLLECTIONS (TOTAL COLUMN 8, FORM ABC 803)	\$ 4.17		
17. TOTAL OF ITEMS 14, 15, AND 16		\$ 265.34	
18. NET AMOUNT DUE FROM STATE FUNDS FOR AID (ITEM 13 MINUS ITEM 17)		\$ 590.37	
19. TOTAL AMOUNT DUE FROM STATE FUNDS FOR AID (ITEM 18, COL. A PLUS ITEM 13, COL. B)		\$ 863.04	

AMOUNTS FOR REPORTING PURPOSES ONLY		CURRENT MONTH	PRIOR MONTHS	APPROVAL STAMP
20. TOTAL OF WARRANT AMOUNTS (ITEM A, FORM CA 802)		\$ 1,706.90	\$ 440.00	
21. TOTAL AMOUNT IN EXCESS OF BASIS FOR STATE PARTICIPATION (ITEM 20 MINUS ITEM 1)		\$ 26.64	\$ 63.00	
22. TOTAL ADJUSTMENTS (TOTAL COLUMN 6, FORM ABC 803)		\$ 35.00		
23. TOTAL CANCELLED WARRANTS FOR PRIOR MONTHS (TOTAL COLUMN 7, FORM CA 804)		\$ 431.00		
24. TOTAL COLLECTIONS (TOTAL COLUMN 6, FORM ABC 803)		\$ 10.00		

STATE OF CALIFORNIA, COUNTY OF XXX) ss 1, Jane Doe
BEING DULY SWORN, DEPOSE AND SAY: THAT I AM THE COUNTY OFFICIAL RESPONSIBLE FOR THE ADMINISTRATION OF AID TO NEEDY CHILDREN IN AND FOR THE SAID COUNTY; THAT ALL THE PROVISIONS OF CHAPTER 1 OF PART 2 OF DIVISION 11 OF THE WELFARE AND INSTITUTIONS CODE, AND AMENDMENTS THERETO, AND TITLE IV OF THE SOCIAL SECURITY ACT, AND AMENDMENTS THERETO, HAVE BEEN COMPLIED WITH TO THE BEST OF MY KNOWLEDGE AND BELIEF.

SUBSCRIBED AND SWORN TO BEFORE ME THIS 7th DAY
OF January, 19 48
Mary Jones
TITLE Deputy County Clerk

SIGNATURE OF WELFARE DIRECTOR OR OFFICIAL IN CHARGE
TITLE Director
APPROVED Richard Roe
CHAIRMAN, BOARD OF SUPERVISORS

I HEREBY CERTIFY THAT WARRANTS COVERING ALL AMOUNTS DUE UNDER THE LAW HAVE BEEN ISSUED AND CHARGED TO FUNDS FOR AID IN ACCORDANCE WITH THE NEEDY CHILDREN LAW, CHAPTER 1 OF PART 2 OF DIVISION 11 OF THE WELFARE AND INSTITUTIONS CODE AND AMENDMENTS THERETO.

John Smith
SIGNATURE OF COUNTY AUDITOR

FORM CA 800, REVISED JUNE, 1947
AFFIDAVIT TO ACCOMPANY MONTHLY VOUCHER AID
PAYROLL (FORM CA 801)

CREDIT VOUCHER CLAIM-AID

(Section continued on next page)

629-99 (Continued)

629-99

FORM CA 802

STATE OF CALIFORNIA
FROM XXXX COUNTY
FOR AID TO NEEDY CHILDREN
MONTH OF December 1947
(INCLUDE ONLY AID COVERING MONTHS AFTER OCTOBER 1, 1946)

RECAPITULATION SHEET
FORWARD TWO COPIES TO
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIA

SUPPLEMENT FOR PRIOR MONTHS

ITEM A. TOTAL OF WARRANT AMOUNTS
(TOTAL WARRANT COL. 4, FORM CA 801)
(TO BE CARRIED FORWARD TO ITEM 20 ON AFFIDAVIT, FORM CA 800) \$ 440.00

ITEM B. TOTAL BASIS FOR STATE PARTICIPATION
(TOTAL COLUMNS 5A AND 5B, FORM CA 801)
(TO BE CARRIED FORWARD TO ITEM 1 ON AFFIDAVIT, FORM CA 800) \$ 377.00

ITEM C. TOTAL INELIGIBLE FOR FEDERAL PARTICIPATION
(TOTAL COLUMN 5B, FORM CA 801)
(TO BE CARRIED FORWARD TO ITEM 2 ON AFFIDAVIT, FORM CA 800) \$ 286.00

ITEM D. TOTAL ELIGIBLE FOR FEDERAL PARTICIPATION
(TOTAL COLUMN 5A, FORM CA 801)
(TO BE CARRIED FORWARD TO ITEM 3 ON AFFIDAVIT, FORM CA 800) \$ 89.00

COMPUTATION OF FEDERAL, STATE AND COUNTY SHARES:

CASES HAVING REQUIRED COUNTY RESIDENCE	COLUMN 1 BASIS FOR STATE PARTICIPATION	COLUMN 2 BASIS FOR FEDERAL PARTICIPATION (A) 2/3 BASIS TOTAL NO. EL. CHN. ON PAYROLL X \$9.00	COLUMN 3 FEDERAL SHARE 2/3 COL. 2A PLUS 1/2 COL. 2B ON RECAP. SHEET	COLUMN 4 STATE SHARE	COLUMN 5 COUNTY SHARE
ITEM E) ELIGIBLE FOR FEDERAL PARTICIPATION (TOTAL COL. 5A, FORM CA 801) TOTAL, COL. 1 FED., COLS. 2 & 3	\$ 89.00	\$ -0-	\$ 8.00	\$ 4.00	
F) INELIGIBLE FOR FED. PARTICIPATION (TOTAL COL. 5B, FORM CA 801)	\$ 216.00				
G) TOTAL ITEMS E AND F	\$ 305.00				
H) LESS FEDERAL SHARE (SAME AS ITEM E, COLUMN 3)	\$ 4.00				
I) BASIS FOR COMPUTING STATE SHARE (ITEM G LESS ITEM H)	\$ 301.00				
J) STATE SHARE, COL. 4 (2/3 ITEM I) COUNTY SHARE, COL. 5 (1/3 ITEM I)				\$ 200.67	\$ 100.33
CASES NOT HAVING REQUIRED COUNTY RESIDENCE		TOTAL NO. EL. CHN. ON PAYROLL X \$9.00	COL. 6 ON PAYROLL MINUS ITEM K, COL. 2A ON RECAP. SHEET		
ITEM K) ELIGIBLE FOR FEDERAL PARTICIPATION (TOTAL COL. 5A, FORM CA 801) TOTAL, COL. 1 FED., COLS. 2 & 3	\$	\$	\$		
L) INELIGIBLE FOR FED. PARTICIPATION (TOTAL COL. 5B, FORM CA 801)	\$ 72.00				
M) TOTAL ITEMS K AND L	\$ 72.00				
N) LESS FEDERAL SHARE (SAME AS ITEM K, COLUMN 3)	\$ -0-				
O) STATE SHARE (ITEM M LESS ITEM N)				\$ 72.00	
P) GRAND TOTALS (AMTS. TO BE CARRIED FORWARD TO AFFIDAVIT FORM CA 800, AS NOTED)	\$ -0-	\$ 8.00	\$ 4.00	\$ 272.67	\$ 100.33
		2A PLUS 2B TO ITEM 5	TO ITEM 6	TO ITEM 13	TO ITEM 25
FORM CA 802, REVISED DECEMBER 1, 1946 RECAPITULATION SHEET TO ACCOMPANY PAY ROLL (FORM CA 801)					

FORM CA 802

STATE OF CALIFORNIA
FROM XXXX COUNTY
FOR AID TO NEEDY CHILDREN
MONTH OF December 1947
(INCLUDE ONLY AID COVERING MONTHS AFTER OCTOBER 1, 1946)

RECAPITULATION SHEET
FORWARD TWO COPIES TO
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIA

ITEM A. TOTAL OF WARRANT AMOUNTS
(TOTAL WARRANT COL. 4, FORM CA 801)
(TO BE CARRIED FORWARD TO ITEM 20 ON AFFIDAVIT, FORM CA 800) \$ 1,705.90

ITEM B. TOTAL BASIS FOR STATE PARTICIPATION
(TOTAL COLUMNS 5A AND 5B, FORM CA 801)
(TO BE CARRIED FORWARD TO ITEM 1 ON AFFIDAVIT, FORM CA 800) \$ 1,680.26

ITEM C. TOTAL INELIGIBLE FOR FEDERAL PARTICIPATION
(TOTAL COLUMN 5B, FORM CA 801)
(TO BE CARRIED FORWARD TO ITEM 2 ON AFFIDAVIT, FORM CA 800) \$ 284.20

ITEM D. TOTAL ELIGIBLE FOR FEDERAL PARTICIPATION
(TOTAL COLUMN 5A, FORM CA 801)
(TO BE CARRIED FORWARD TO ITEM 3 ON AFFIDAVIT, FORM CA 800) \$ 1,396.06

COMPUTATION OF FEDERAL, STATE AND COUNTY SHARES:

CASES HAVING REQUIRED COUNTY RESIDENCE	COLUMN 1 BASIS FOR STATE PARTICIPATION	COLUMN 2 BASIS FOR FEDERAL PARTICIPATION (A) 2/3 BASIS TOTAL NO. EL. CHN. ON PAYROLL X \$9.00	COLUMN 3 FEDERAL SHARE 2/3 COL. 2A PLUS 1/2 COL. 2B ON RECAP. SHEET	COLUMN 4 STATE SHARE	COLUMN 5 COUNTY SHARE
ITEM E) ELIGIBLE FOR FEDERAL PARTICIPATION (TOTAL COL. 5A, FORM CA 801) TOTAL, COL. 1 FED., COLS. 2 & 3	\$ 1,351.06	\$ 360.00	\$ 331.39	\$ 405.69	
F) INELIGIBLE FOR FED. PARTICIPATION (TOTAL COL. 5B, FORM CA 801)	\$ 284.20				
G) TOTAL ITEMS E AND F	\$ 1,635.26				
H) LESS FEDERAL SHARE (SAME AS ITEM E, COLUMN 3)	\$ 405.69				
I) BASIS FOR COMPUTING STATE SHARE (ITEM G LESS ITEM H)	\$ 1,229.57				
J) STATE SHARE, COL. 4 (2/3 ITEM I) COUNTY SHARE, COL. 5 (1/3 ITEM I)				\$ 819.71	\$ 409.86
CASES NOT HAVING REQUIRED COUNTY RESIDENCE		TOTAL NO. EL. CHN. ON PAYROLL X \$9.00	COL. 6 ON PAYROLL MINUS ITEM K, COL. 2A ON RECAP. SHEET		
ITEM K) ELIGIBLE FOR FEDERAL PARTICIPATION (TOTAL COL. 5A, FORM CA 801) TOTAL, COL. 1 FED., COLS. 2 & 3	\$ 45.00	\$ 9.00	\$ 6.00	\$ 9.00	
L) INELIGIBLE FOR FED. PARTICIPATION (TOTAL COL. 5B, FORM CA 801)	\$				
M) TOTAL ITEMS K AND L	\$ 45.00				
N) LESS FEDERAL SHARE (SAME AS ITEM K, COLUMN 3)	\$ 9.00				
O) STATE SHARE (ITEM M LESS ITEM N)				\$ 36.00	
P) GRAND TOTALS (AMTS. TO BE CARRIED FORWARD TO AFFIDAVIT FORM CA 800, AS NOTED)		\$ 369.00	\$ 337.39	\$ 414.69	\$ 855.71
		2A PLUS 2B TO ITEM 5	TO ITEM 6	TO ITEM 13	TO ITEM 25
FORM CA 802, REVISED DECEMBER 1, 1946 RECAPITULATION SHEET TO ACCOMPANY PAY ROLL (FORM CA 801)					

(Section continued on next page)

(Section continued on next page)

FORM CA-801—Revised October 1, 1946
STATE OF CALIFORNIA
Payroll to accompany affidavit Form CA-800

Forward TWO copies to
STATE DEPARTMENT OF SOCIAL WELFARE
Sacramento, California

Warrants Dated December 1, 1947
(Except as otherwise shown in Column 7)

CLAIM FOR FEDERAL AND STATE AID TO NEEDY CHILDREN

(Excluding aid paid under Section 1556.5 of the Welfare and Institutions Code)

Paid by XXX County

Month of December, 19 47

(INDICATE NON-COUNTY CASES BY (*) IN COLUMNS 5 AND 6)

(1) STATE NUMBER	(2) NAMES OF PAYEE FAMILY NAME OF CHILDREN GIVEN	(3) NO. OF CHILDREN		(4) WARRANT AMOUNT	(5) BASIS FOR STATE PARTICIPATION		(6) BASIS FOR FEDERAL PARTICIPATION	(7) REMARKS	(8) WARRANT NUMBER
		(A) EL.	(B) INEL.		(A) EL. TO FEDERAL	(B) INEL. TO FEDERAL			
10	Ellen Hughes Hughes, Opal	1		15.48	15.48	15.48	" (EXAMPLE F)	509	
11	Elizabeth Nielsen Nielsen, Winifred Ruth Mary	3		100.00	100.00		54.00 (SEE EXAMPLE A, SEC. 627-45, FEDERAL PARTICIPATION WHEN AN ADDITIONAL CHILD BECOMES ELIGIBLE FOR AID DURING MONTH.)	510	
12	Leslie Sierra Sierra, Jack Florence Norman	3		150.00	150.00		54.00	" (EXAMPLE B)	511
13	Ann Ridge Ridge, Mary Louise Sarah	3		100.00 11.61	111.61		50.61	" (EXAMPLE C)	512 513
14	Fannie Black Black, Flora Laura Robert Jones, Jane Roy	5		200.00	200.00		84.00 (SEE SEC. 627-45, TWO OR MORE FAMILY BUDGET UNITS IN ONE HOUSEHOLD.)	514	
15	Mary Tully Tully, Robert	1		80.64		72.00	(SEE EXAMPLE E, SEC. 627-45, PARTIAL MONTHS' CLAIMS BASIS FOR STATE AND FEDERAL PARTICIPATION.)	515	
16	Doris Buehler Buehler, Esther Nellie Florence	3		30.65	30.65	30.65	" (EXAMPLE F)	516	
17	Helen Frye Frye, Alice Jean Elma	2	1	43.87	39.00	4.87	39.00	" (EXAMPLE G)	517
				1,706.90	1,396.06	284.20	706.39		

Total number of children on this page eligible 20 ineligible 2
(Supplemental warrants covering increases for children already counted on the current payroll or previous month's
payroll must be included in the total number of children)

Page No. 2

FORM CA 801

FORM CA-801—Revised October 1, 1946
STATE OF CALIFORNIA
Payroll to accompany affidavit Form CA-800

Forward TWO copies to
STATE DEPARTMENT OF SOCIAL WELFARE
Sacramento, California

Warrants Dated December 1, 1947
(Except as otherwise shown in Column 7)

CLAIM FOR FEDERAL AND STATE AID TO NEEDY CHILDREN

(Excluding aid paid under Section 1556.5 of the Welfare and Institutions Code)

Paid by XXX County

Month of December, 19 47 SUPPLEMENT FOR PRIOR MONTHS

(INDICATE NON-COUNTY CASES BY (*) IN COLUMNS 5 AND 6)

(1)	(2)	(3)		(4)	(5)		(6)	(7)	(8)
STATE NUMBER	NAMES OF PAYEE FAMILY GIVEN	NO. OF CHILDREN		WARRANT AMOUNT	BASIS FOR STATE PARTICIPATION		BASIS FOR FEDERAL PARTICI- PATION	REMARKS	WARRANT NUMBER
		(A) EL.	(B) INEL.		(A) EL. TO FEDERAL	(B) INEL. TO FEDERAL			
					OCTOBER, 1947				
8	Alice Hicks Hicks, John			44.50	44.50		4.00	CASE #8 REPRESENTS RETROACTIVE AID PAID BECAUSE OF INCREASED NEED. \$20.00 AUTHO- RIZED AWARD PAID FOR OCTOBER AND NOVEMBER. INCREASED TO \$63.50 EFFECTIVE 10-1-47. SUPPLEMENTAL \$89.00 WARRANT ISSUED FOR OCTOBER AND NOVEMBER IN DECEMBER.	507
7	John Robert Robert, Joan* Susan William	3		175.50		*36.00 108.00		CASE #7 REPRESENTS RETROACTIVE AID UNDER 90-DAY LAW.	506
					NOVEMBER, 1947				
8	Alice Hicks Hicks, John			44.50	44.50		4.00		507
7	John Robert Robert, Joan* Susan William	3		175.50		*36.00 108.00			506
				440.00	89.00	288.00	8.00		
NOTE: Individual warrants for each month or one warrant covering all months for each case may be issued, the amount paid for each month to be reported separately.									

NOTE: Individual warrants for each month or one warrant covering all months for each case may be issued, the amount paid for each month to be reported separately.

Total number of children on this page eligible 0 ineligible 6
(Supplemental warrants covering increases for children already counted on the current payroll or previous month's
payroll must be included in the total number of children)

Page No. 3

FORM CA 801

STATE OF CALIFORNIA

FORWARD TWO COPIES TO
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIA

AID AFFIDAVIT

FROM XXX COUNTY

FOR THE SUPPORT OF
NEEDY CHILDREN MAINTAINED IN BOARDING HOMES AND INSTITUTIONS
(AS PROVIDED UNDER SECTION 1556.5 OF THE WELFARE AND INSTITUTIONS CODE)

MONTH OF December 1947 FISCAL YEAR
(STATE USE ONLY)

AMOUNT DUE FROM STATE FUNDS FOR AID	FOR CURRENT MONTH COLUMN A	FOR PRIOR MONTHS COLUMN B
1. TOTAL BASIS FOR STATE PARTICIPATION (TOTAL COLUMN 5A AND 5B, FORM CA 801-BHI) NUMBER OF CHILDREN: CURRENT MONTH <u>10</u> ; PRIOR MONTHS.....	\$ 443.37	\$ 10.00
2. TOTAL AMOUNT DUE FROM STATE FUNDS FOR AID (2/3 OF COLUMN 5A PLUS TOTAL COLUMN 5B, FORM CA 801-BHI).....	\$ 307.68	\$ 6.67
3. STATE SHARE OF ADJUSTMENTS (TOTAL COLUMN 8, FORM ABC 803).....	\$ -0-	
4. STATE SHARE OF CANCELED WARRANTS FOR PREVIOUS MONTHS (TOTAL COLUMN 10, FORM CA 804).....	\$ -0-	
5. STATE SHARE OF COLLECTIONS (TOTAL COLUMN 8, FORM ABC 803).....	\$ -0-	
6. TOTAL OF ITEMS 3, 4, AND 5.....	\$ -0-	
7. NET AMOUNT DUE FROM STATE FUNDS FOR AID (ITEM 2 MINUS ITEM 6).....	\$ 307.68	
8. TOTAL AMOUNT DUE FROM STATE FUNDS FOR AID (ITEM 7, COL. A PLUS ITEM 2, COL. B)	\$ 314.35	

AMOUNTS FOR REPORTING PURPOSES ONLY	FOR CURRENT MONTH	FOR PRIOR MONTHS	APPROVAL STAMP
9. TOTAL AID PAID (TOTAL WARRANT COLUMN 4, FORM CA 801-BHI).....	\$ 478.35	10.00	
10. TOTAL COUNTY SUPPLEMENTAL AID (ITEM 9 MINUS ITEM 1).....	\$ 34.98		
11. TOTAL ADJUSTMENTS (TOTAL COLUMN 6, FORM ABC 803).....	\$ -0-		
12. TOTAL CANCELED WARRANTS FOR PREVIOUS MONTHS (TOTAL COLUMN 7, FORM CA 804).....	\$ -0-		
13. TOTAL COLLECTIONS (TOTAL COLUMN 6, FORM ABC 803).....	\$ -0-		

STATE OF CALIFORNIA } ss
COUNTY OF XXX

I, Jane Doe, BEING DULY SWORN, DEPOSE AND SAY: THAT I AM THE COUNTY OFFICIAL RESPONSIBLE FOR THE ADMINISTRATION OF AID TO NEEDY CHILDREN IN AND FOR THE SAID COUNTY; THAT ALL THE PROVISIONS OF CHAPTER 1 OF PART 2 OF DIVISION 11 OF THE WELFARE AND INSTITUTIONS CODE, AND AMENDMENTS THERETO, HAVE BEEN COMPLIED WITH TO THE BEST OF MY KNOWLEDGE AND BELIEF.

SUBSCRIBED AND SWORN TO BEFORE ME THIS 7th DAY OF January, 1948

Mary Jones
Deputy County Clerk

SIGNATURE OF WELFARE DIRECTOR OR OFFICIAL IN CHARGE
TITLE Director
APPROVED Richard Roe
CHAIRMAN, BOARD OF SUPERVISORS

I HEREBY CERTIFY THAT WARRANTS COVERING ALL AMOUNTS DUE UNDER THE LAW HAVE BEEN ISSUED AND CHARGED TO FUNDS FOR AID IN ACCORDANCE WITH THE NEEDY CHILDREN LAW, CHAPTER 1 OF PART 2 OF DIVISION 11 OF THE WELFARE AND INSTITUTIONS CODE AND AMENDMENTS THERETO.

John Smith
SIGNATURE OF COUNTY AUDITOR

FORM CA 800-BHI, REVISED JUNE, 1947
AFFIDAVIT TO ACCOMPANY MONTHLY PAYROLL,
(FORM CA 801-BHI)

CASH CLAIM-AID

FORM CA 800-BHI

Form CA 801-BHI—Revised May, 1942
STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
Pay roll as per county warrant register to
accompany affidavit Form CA 800-BHI
for State Aid to Needy Children

Forward TWO copies to the State Department
of Social Welfare, Sacramento

Warrants Dated December 31, 1947
(Except as otherwise shown in Column 6)

MONTHLY CLAIM FOR STATE AID TO NEEDY CHILDREN

For Children in Boarding Homes and Institutions
(Under Section 1556.5 of the Welfare and Institutions Code)

Supported by XXX County, California

For the Month of December, 1947

(1) STATE NUMBER	(2) NAMES OF PAYEE FAMILY NAMES OF CHILDREN GIVEN	(3) NO. OF CHILD- REN	(4) WARRANT AMOUNT	(5) BASIS FOR STATE PARTICIPATION		(6) REMARKS	(7) WARRANT NUMBER
				(A) STATE AND CO. SHARE	(B) NON-CO. SHARE		
3	Adams, Jane Ricks, John	1	40.00	21.00		(SEE SEC. 621-20, APPORTIONMENT OF GRANTS ON PAYROLLS OR CLAIMS.) (SEE EXAMPLE D, SEC. 627-25, COMPUTATION OF PAYMENT WHEN CHILD TRANSFERS BETWEEN A PRIVATE HOME AND A BOARDING HOME.)	518
4	Baker Children's Home French, Elsie	1	50.32	50.32		" EXAMPLE E	519
5	Burns, Helen Hughes, Opal	1	67.74	65.76		" EXAMPLE F	520
2	Children's Home (Institution) James, Jean	1	36.00	36.00			521
1	Helen Stone Children's Home Smith, Andrew Bertha	2	72.00 36.00	72.00 36.00			522
6	Lang, Anne Nix, James	1	36.29		36.29	(SEE EXAMPLE D, SEC. 627-25, PARTIAL MONTHS CLAIMS - BASIS FOR STATE AND FEDERAL PARTICIPATION.)	523
7	Smith, Mary	3	50.00	36.00		(SEE EXAMPLE E, SEC. 627-26, BHI PAYROLLS.)	524
8	Jones, Helen		60.00	60.00			
9	Brown, Mary		30.00	30.00			
	Thomas, Dora						
			478.35	407.08	36.29		
						SUPPLEMENT FOR PRIOR MONTHS	
			NOVEMBER, 1947			SEE SEC. 626-50, SUP- PLEMENTAL AID CLAIMS.	
1	Helen Stone Children's Home Smith, Andrew Bertha		5.00 5.00	5.00 5.00		(CARE REPRESENTS ERRONEOUS PAYMENT OF LESS THAN AUTHORIZED AMOUNT. AUTHORIZED AMOUNT WAS \$12 AND \$25, BUT COUNTY ONLY PAID \$67 AND \$31 IN NOVEMBER 1947.)	525

Two-thirds of the total of Column 5A plus the total of Column 5B equals the State share.

Page No. 1

FORM CA 801-BHI

629-99 (Continued)

629-99

629-99 (Continued)

629-99

Form ABC 803
Schedule to Accompany
Monthly Aid Claims

REPORT OF ADJUSTMENTS*

FROM XXXX COUNTY

Children's Aid

To ACCOMPANY December 194 7, MONTHLY AID CLAIM

Form ABC 803
SUBMIT TWO COPIES TO
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO 14, CALIFORNIA

(1) NAME OF PAYEE FAMILY GIVEN	(2) NAMES OF CHILDREN (FOR CHILDREN'S AID ONLY) FAMILY GIVEN	(3) STATE NUMBER	(4) PERIOD COVERED	(5) REASON	(6) TOTAL AMOUNT	(7) FEDERAL	(8) STATE	(9) COUNTY	(10) REMARKS
Johnson, Rose	Johnson, Lola Alice	4	December 1946	Excess Income	\$35.00	3.25	21.17	10.58	(See Section 672-50, Dis- tribution of Adjustments, Example E)

(Form Ag, B1 & CA 808 should be submitted for each repayment upon its receipt by the County and prior to its being reported on this schedule.)
* This form may be used for the reporting of collections by changing the above title to "Report of Collections."

Form ABC 803
Schedule to Accompany
Monthly Aid Claims

REPORT OF COLLECTIONS
ADJUSTMENTS*

FROM XXXX COUNTY

Children's Aid

To ACCOMPANY December 194 7, MONTHLY AID CLAIM

Form ABC 803
SUBMIT TWO COPIES TO
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO 14, CALIFORNIA

(1) NAME OF PAYEE FAMILY GIVEN	(2) NAMES OF CHILDREN (FOR CHILDREN'S AID ONLY) FAMILY GIVEN	(3) STATE NUMBER	(4) PERIOD COVERED	(5) REASON	(6) TOTAL AMOUNT	(7) FEDERAL	(8) STATE	(9) COUNTY	(10) REMARKS
Frye, Helen	Frye, Alice	6	October 1946	Voluntary	10.00	3.75	4.17	2.08	(See Section 673-25, Distribution of Collections)

(Form Ag, B1 & CA 808 should be submitted for each repayment upon its receipt by the County and prior to its being reported on this schedule.)
* This form may be used for the reporting of collections by changing the above title to "Report of Collections."

STATE OF CALIFORNIA

REPORT OF CANCELLED WARRANTS

FROM XXX COUNTY

FOR AID TO NEEDY CHILDREN

To ACCOMPANY December 194 7, MONTHLY CHILDREN'S AID CLAIM

Submit two copies to
Form CA 804
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO 14, CALIFORNIA

(1) NAME OF PAYEE FAMILY GIVEN	(2) NAMES OF CHILDREN FAMILY GIVEN	(3) STATE NUMBER	(4) WARRANT NUMBER	(5) WARRANT DATE	(6) MONTH AND YEAR CLAIMED	(7) WARRANT AMOUNT	(8) BASIS FOR STATE PARTICIPATION	(9) AMOUNT OF CANCELLATION FEDERAL	(10) STATE	(11) COUNTY	(12) Do Not Write in This Column
White, Elizabeth	Smith, Andrew Henry Jean	2	382	11/1/47	11/47	170.00	166.50	22.50	96.00	51.50	(See Sec. 628-05, Reporting of Cancelled Aid Warrants)
Burns, Helen	Hughes, Opal	10	243	10/1/47	10/47	85.50	85.50	13.50	48.00	24.00	(2 ch. elig. to Fed. 1 ch. incl. to Fed.)
Nielsen, Elizabeth	Nielsen, Winifred Ruth Mary	11	244	10/1/47	10/47	175.50	175.50	31.50	96.00	48.00	(1 ch. elig. to Fed.)
TOTAL						431.00	427.50	67.50	240.00	123.50	(3 ch. elig. to Fed.)

Form CA 804 (revised)—November, 1943

CURRENT CANCELLATIONS SHOULD BE CROSSED OFF THE PAYROLL AND NOT INCLUDED IN THE TOTALS

(Section continued on next page)

646-99 (Continued)

646-99

FORM DFA 64, Part 1

State of California

(A) IF MONTH COVERED IS LESS THAN FULL MONTH OR CHANGE OF SALARY RATE OCCURRED WITHIN THE MONTH, FORM DFA 64-B SHOULD ALSO BE COMPLETED AND ATTACHED.

ADMINISTRATIVE EXPENSE WORKSHEET FOR
ALLOCATION OF EXPENDITURES BASED ON RESULTS OF TIME
RECORDING

FOR SALARIES AND WAGES ONLY

Department of Social Welfare

Forward Three Copies to the State
Department of Social Welfare,
Sacramento, California

County of XXX
Month of June 1947

WARRANT		NAME AND CLASSIFICATION TITLE OF EACH EMPLOYEE (See Reverse Side for Instructions)	MONTH COVERED (SALARIES & WAGES ONLY)	1	2	3	4	5	6	7
DATE	NUMBER									
				GROSS TOTAL EXPENDITURES	LESS EXTRANEIOUS EXPENDITURES	TOTAL ALLOCABLE EXPENDITURES	AGED OLD AGE SECURITY	BOARDING HOME ADMINIS- TRATION	ELIGIBLE	IN- ELIGIBLE
7/2/47	615	Keller, Frank CWD V	June 1947	\$450.00		\$450.00				
	616	Benson, Richard P.A.S. I	June 1947	240.00		240.00	24.50	3.00	12.50	
	617	Simmes, Robert P.A.S. I	June 1947	220.00	80.00	140.00	20.00	10.00		
	618	Morgan, Francis FAW II	June 1947	200.00		200.00	18.00		13.40	4.00
	619	Mason, Jane FAW I	June 1947	180.00		180.00	62.50	18.00	29.00	13.00
	620	Olson, Mary CWSW	June 1947	225.00		225.00				
	621	Dann, James Storekeeper	June 1947	200.00		200.00				
	622	Brickson, Robert SR CLK	June 1947	190.00		190.00	18.75	6.25	16.00	
	623	Bell, Louise JR TYP CLK	June 1947	140.00		140.00	30.00	5.50		
	624	Johnson, Shirley SR ST CLK	6/20 - 6/30	58.67		58.67	28.75		12.25	
	625	Wilson, Joan A. JR CLK	6/1 - 6/20	93.34		93.34	26.80		14.00	
		Total Direct And Allocated SAW (Excluding Joint And Over-All)		2,197.01	80.00	2,117.01	229.30	42.75	97.15	17.00
		Allocation of Joint SAW				23.03			9.76	
		Total Direct Allocated & Joint SAW (excluding over-all)		2,197.01	80.00	2,117.01	252.33	42.75	106.91	17.00
		Allocation of Over-All SAW					266.30	45.12	112.83	17.94
		Total of All Salaries & Wages		2,197.01	80.00	2,117.01	518.63	87.87	219.74	34.94

FORM DFA 64, PART 1 REVISED JANUARY, 1947
(TO ACCOMPANY ADMINISTRATIVE EXPENSE AFFIDAVITS)

FORM DFA 64, Part 2

State of California

(B) SPECIFY JOINT COMBINATIONS OF PROGRAMS
BY COLUMN NUMBERS FOR EACH AMOUNT

ADMINISTRATIVE EXPENSE WORKSHEET FOR ALLOCATION
OF EXPENDITURES BASED ON RESULTS OF TIME RECORDING
(Continued)

FOR SALARIES AND WAGES ONLY

Department of Social Welfare

Forward Three Copies to the State
Department of Social Welfare
Sacramento, California

County of XXX
Month of June 1947

8	9	10	11	12	13	14	15	16	17	18	19
CHILDREN			GENERAL RELIEF	CHILD WELFARE SERVICES	COMMISSARY	CRIPPLED CHILDREN SERVICES	SCHOOL LUNCHS	CIVILIAN WAR ASSIS- TANCE	JOINT EXPENDITURES (AMOUNTS)	PROGRAM COMBINATIONS FOR AMOUNTS IN COL. 17	OVER-ALL EXPENDITURES
ELIGIBLE	INELIGIBLE	BOARDING HOME ADMINISTRATION									
9.50											\$ 450.00
6.50	4.50		4.00								190.50
32.00	8.00	6.60									95.00
16.00	10.00	6.00	13.00								118.00
				225.00	200.00						12.50
5.75	2.00	8.00					4.25				129.00
11.00		4.50				4.00		3.50	41.50	4 1 6 4 8	40.00
6.00											11.67
	4.00		8.20								40.34
86.75	26.50	25.10	25.20	225.00	200.00	4.00	4.25	3.50	41.50		1,087.01
8.71									41.50		
95.46	26.50	25.10	25.20	225.00	200.00	4.00	4.25	3.50			1,087.01
100.74	30.08	26.49	26.59	237.45	211.07	4.22	4.49	3.69			1,087.01
196.20	58.58	51.59	51.79	562.45	411.07	8.22	8.74	7.19			

FORM DFA 64, PART 2, REVISED JANUARY, 1947
(TO ACCOMPANY ADMINISTRATIVE EXPENSE AFFIDAVITS)

(Section continued on next page)

646-99

FORM DFA 42 (Revised)—August, 1942

(Section continued on next page)

646-99 (Continued)

646-99

FORM DFA 64-B

FORWARD THREE COPIES TO THE
DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIACOUNTY OF XXXMONTH OF June 19 47

STATE OF CALIFORNIA

SUMMARY OF COUNTY EMPLOYEES PAID LESS THAN FULL TIME MONTHLY SALARY
(TO BE USED BY ALL MERIT SYSTEM COUNTIES)

1 WARRANT		2 NAME AND CLASSIFICATION TITLE OF EACH EMPLOYEE (SEE REVERSE SIDE OF FORM DFA 64)	3 DATES EMPLOYED		4 TOTAL NO. DAYS PAID	5 RATE FOR FULL MONTH	6 AMOUNT OF GROSS SALARY EARNED (SAME AS COL 1 FORM DFA 64)	7 REMARKS
DATE	NUMBER		FROM	THROUGH				
7/2/47	624	Johnson, Shirley, SR ST CLK	6/20/47	6/30/47	11	160.00	58.67	New Employee Appointment effective 6/20/47
"	625	Wilson, Joan A. JR CLK	6/1/47	6/20/47		140.00	93.34	Resignation Effective 6/20/47

NOTE: PARTIAL MONTH SALARY COMPUTED ON BASIS OF _____ DAYS IN MONTH.
FORM DFA 64-B, REV. JANUARY, 1947
(TO ACCOMPANY FORMS DFA 64 AND DFA 64-A)

646-99 (Continued)

646-99

State of California

FORM DFA 64-A, Part 1

Department of Social Welfare

ADMINISTRATIVE EXPENSE WORKSHEET FOR ALLOCATION
OF EXPENDITURES BASED ON RESULTS OF TIME RECORDING

Forward Three Copies to the
State Department of Social Welfare
Sacramento, California

FOR MAINTENANCE AND OPERATION AND CAPITAL OUTLAY

County of XXX

Month of June 1947

GRAND TOTAL ALL SALARIES AND WAGES CARRIED FORWARD FROM DFA 64			\$ 2,197.01	\$ 80.00	\$ 2,117.01	\$ 518.63	\$ 87.87	\$ 219.74	\$ 34.94
WARRANT			1	2	3	4	5	6	7
DATE	NUMBER	OBJECT OF EXPENDITURES	GROSS TOTAL EXPEN- DITURES	LESS: EXTRANEOUS EXPEN- DITURES	TOTAL ALLOCABLE EXPEN- DITURES	AGED		BLIND	
						OLD AGE SECURITY	BOARDING HOMES ADMIN- ISTRATION	ELIGIBLE	INELIGIBLE
1		<u>SUPPLIES</u>							
2	7/4/47	824 Wilson Stationery Co. pencils & ink	12.50		12.50				
3	"	825 Remington Co. Typewriter Ribbons	14.00		14.00				
4	"	826 Bureau of Purchases Forms	100.00		100.00	44.00	8.00	11.00	
5	"	827 500 Business cards - CC	3.08		3.08				
6	"	828 <u>BLIND RTZ EXAMINATIONS</u>							
7	"	828 Raymond T. Leason, M.D.	10.00		10.00			10.00	
8	"	829 <u>TRAVEL</u>							
9	"	829 James Akers Mileage	18.00		18.00	12.00		6.00	
10	"	830 Ralph Johnson	12.60		12.60			7.00	
11	"	831 <u>RENT</u>							
12	"	831 Nelson & Co. Real Estate Co. Rent	100.00		100.00				
13	"	832 <u>COMMUNICATIONS</u>							
14		Western Union Telegrams	6.40		6.40				
15		Total M&O (Before Allocation of	276.58		276.58	56.00	8.00	34.00	
16		Joint & Overall)				4.20		1.78	
17		Allocation of Joint M&O				30.99	5.25	13.13	2.09
18		Allocation of Over-all M&O				91.19	13.25	48.91	2.09
19		Total M&O After Allocation	276.58		276.58				
20	7/4/47	833 <u>CAPITAL OUTLAY</u>							
21		Marchant Co. Calculator	876.40		876.40	214.70	36.38	90.97	14.46
22		Allocation of Capital Outlay				214.70	36.38	90.97	14.46
23		Total Capital Outlay (After Allo-	876.40		876.40				
24		cation)							
25		Total S&W, M&O And Capital Outlay	3,349.99	80.00	3,269.99	824.52	137.50	359.62	51.49
26		<u>WARRANT WRITING SERVICE</u>							
27		446 Aged Cases .0720	32.11		32.11	32.11			
28		17 Blind Cases .0678	1.49		1.49			1.49	
29		57 Children Cases .0738	4.55		4.55				
30		Grand Total S&W, M&O, Capital	3,388.14	80.00	3,308.14	856.63	137.50	361.11	53.49
31		Outlay and Warrant Writing.							

FORM DFA 64-A, PART 1, REVISED JANUARY, 1947

(TO ACCOMPANY ADMINISTRATIVE EXPENSE AFFIDAVITS)

State of California

ADMINISTRATIVE EXPENSE WORKSHEET FOR ALLOCATION
OF EXPENDITURES BASED ON RESULTS OF TIME RECORDING
(Continued)
FOR MAINTENANCE AND OPERATION AND CAPITAL OUTLAY

FORM DFA 64-A Part 2
Department of Social Welfare
Forward Three Copies to the
State Department of Social Welfare
Sacramento, California
County of XXX
Month of June 1947

(A) Specify Joint Combinations of Programs by
Column Numbers for Each Amount

\$ 196.20 8	58.58 9	51.59 10	\$ 51.79 11	\$ 462.45 12	\$ 411.07 13	\$ 8.22 14	\$ 8.74 15	\$ 7.19 16	\$ 17	\$ 18	\$ 19	
CHILDREN												
ELIGIBLE	INELIGIBLE	BOARDING HOMES ADMIN- ISTRATION	GENERAL RELIEF	CHILD WELFARE SERVICES	COMMISSARY	CRIPPLED CHILDREN SERVICE	SCHOOL LUNCHES E	CIVILIAN WAR ASSISTANCE	JOINT EXPENDITURES (AMOUNTS)	PROGRAM COMBINATIONS FOR AMOUNTS IN COL. 17 (A)	OVER ALL EXPENDI- TURES	
1												1
2												2
3	32.60											3
4			4.40									4
5						3.08						5
6												6
7												7
8												8
9	5.60											9
10												10
11											100.00	11
12												12
13	38.20		4.40			3.08			6.40	446.10		13
14									6.40		126.50	14
15												15
16	11.72	3.50	4.42	3.09	27.64	24.57	.49	.52	6.40			16
17	49.92	3.50	7.90	3.09	27.64	24.57	3.57	.52	.43		126.50	17
18												18
19	81.22	24.25	21.36	21.44	191.45	170.17	3.40	3.62	2.98		876.40	19
20	81.22	24.25	21.36	21.44	191.45	170.17	3.40	3.62	2.98		876.40	20
21												21
22	327.34	86.33	80.85	76.32	681.54	605.81	15.19	12.88	10.60			22
23												23
24												24
25												25
26	4.65											26
27	331.89	86.33	80.85	76.32	681.54	605.81	15.19	12.88	10.60			27
28												28

FORM DFA 64A, PART 2, REVISED JANUARY, 1947
(TO ACCOMPANY ADMINISTRATIVE EXPENSE AFFIDAVITS)

(Section continued on next page)

646-99 (Continued)

646-99

FORM Ag 807-A

STATE OF CALIFORNIA

DEPARTMENT OF SOCIAL WELFARE

FORWARD TWO COPIES TO THE
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIA

STATE OF CALIFORNIA

OLD AGE SECURITY ADMINISTRATIVE EXPENSE AFFIDAVIT

FROM XXX COUNTY

FOR AMOUNT DUE FROM FEDERAL FUNDS FOR ADMINISTRATION OF AGED PROGRAMS

FOR MONTH OF June, 1947 FISCAL YEAR
(FOR STATE USE ONLY)

AMOUNT DUE FROM FEDERAL FUNDS FOR ADMINISTRATION OF AID TO NEEDY AGED		CORRECTED AMOUNTS (STATE USE ONLY)
1. TOTAL AMOUNT PAID BY COUNTY FOR ADMINISTRATION OF OLD AGE SECURITY. (TOTAL OF COL. 4, DFA 64A.).....	\$ <u>856.63</u>	\$ _____
2. TOTAL AMOUNT DUE FROM FEDERAL FUNDS FOR ADMINISTRATION OF OLD AGE SECURITY PROGRAM (1/2 OF ITEM 1, ABOVE).....	\$ <u>428.32</u>	\$ _____

FOR STATE USE ONLY

3. FEDERAL SHARE OF ADJUSTMENTS OF ADMINISTRATIVE EXPENSE FOR OLD
AGE SECURITY PROGRAM..... \$ _____
4. ADJUSTED AMOUNT DUE FROM FEDERAL FUNDS FOR ADMINISTRATIVE EXPENSE
FOR OLD AGE SECURITY PROGRAM..... \$ _____

STATE OF CALIFORNIA

COUNTY XXX)SS

Frank Keller, BEING DULY SWORN, DEPOSES AND SAYS: THAT HE IS THE COUNTY
OFFICIAL RESPONSIBLE FOR THE ADMINISTRATION OF OLD AGE SECURITY IN AND FOR THE SAID COUNTY, THAT ALL OF THE
PROVISIONS OF CHAPTER 1 OF DIVISION 111 OF THE WELFARE & INSTITUTIONS CODE, AND AMENDMENTS THERETO, AND TITLE 1
OF THE SOCIAL SECURITY ACT, AND AMENDMENTS THERETO, HAVE BEEN COMPLIED WITH TO THE BEST OF MY KNOWLEDGE AND
BELIEF AND THAT THE ABOVE EXPENDITURES WERE INCURRED IN ADMINISTERING, OR WERE ALLOCATED TO, SUCH PROGRAM. THAT
WITH REGARD TO EXPENDITURES FOR SALARIES & WAGES INCLUDED HEREIN ALL EMPLOYMENTS AND RATES ARE CORRECTLY SHOWN
AND ARE BASED UPON AUTHORIZATION IN COMPLIANCE WITH THE REQUIREMENTS OF THE RULES FOR A MERIT SYSTEM OF PERSONNEL
ADMINISTRATION OF THE STATE PUBLIC ASSISTANCE PROGRAM AS AUTHORIZED IN DIVISION 1, CHAPTER 1, SECTION 119.5 OF
THE WELFARE & INSTITUTIONS CODE, AND AMENDMENTS THERETO.

SUBSCRIBED AND SWORN TO BEFORE ME THIS 7 DAY
OF July, 1947William JamesonTITLE Deputy County ClerkFrank Keller
SIGNATURE OF WELFARE DIRECTOR OR OFFICIAL IN CHARGETITLE County Welfare DirectorAPPROVED Warren Jensen
CHAIRMAN, BOARD OF SUPERVISORSI HEREBY CERTIFY, THAT WARRANTS HAVE BEEN ISSUED, OR FUNDS ENCUMBERED, TO PROVIDE LIQUIDATION OF WELFARE
ADMINISTRATIVE EXPENDITURES AS REFLECTED BY THAT AGENCY'S STATEMENT OF EXPENDITURES FOR THE MONTH.Martin Grimes
SIGNATURE OF COUNTY AUDITORFORM AG 807A, JANUARY, 1947
AGED ADMINISTRATIVE EXPENSE AFFIDAVIT
TO ACCOMPANY MONTHLY ADMINISTRATIVE
EXPENSE WORKSHEETS

(Section continued on next page)

646-99 (Continued)

646-99

Form Ag 807

STATE OF CALIFORNIA

DEPARTMENT OF SOCIAL WELFARE

FORWARD TWO COPIES TO THE
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIA

STATE OF CALIFORNIA

ADMINISTRATIVE EXPENSE AFFIDAVIT

FROM XXX COUNTY

FOR AMOUNT DUE FROM FEDERAL FUNDS FOR ADMINISTRATION OF AGED PROGRAMS

FOR MONTH OF June, 19 47 FISCAL YEAR
(FOR STATE USE ONLY)DO NOT WRITE IN
THIS SPACE

AMOUNT DUE FROM FEDERAL FUNDS FOR ADMINISTRATION OF AID TO NEEDY AGED

		CORRECTED AMOUNTS (STATE USE ONLY)
1. TOTAL AMOUNT PAID BY COUNTY FOR ADMINISTRATION OF OLD AGE SECURITY AND AGED BOARDING HOME ADMINISTRATION. (TOTAL OF COLS. <u>4</u> AND <u>5</u> , DFA 64A.)	\$ <u>994.13</u>	\$ _____
(A) COST FOR PERSONS ELIGIBLE FOR OLD AGE SECURITY. (COL. <u>4</u> DFA, 64A.)	\$ <u>856.63</u>	
(B) COST OF AGED BOARDING HOME ADMINISTRATION (COL. <u>5</u> DFA, 64A.)	\$ <u>137.50</u>	
2. TOTAL AMOUNT DUE FROM FEDERAL FUNDS FOR ADMINISTRATION OF OLD AGE SECURITY AND AGED BOARDING HOMES (1/2 OF ITEM 1, ABOVE).....	\$ <u>497.07</u>	\$ _____

FOR STATE USE ONLY

3. FEDERAL SHARE OF ADJUSTMENTS OF ADMINISTRATIVE EXPENSE FOR OLD AGE SECURITY RECIPIENTS	\$ _____
4. FEDERAL SHARE OF ADJUSTMENTS OF ADMINISTRATIVE EXPENSE FOR AGED BOARDING HOME ADMINISTRATION.....	\$ _____
5. ADJUSTED AMOUNT DUE FROM FEDERAL FUNDS FOR ADMINISTRATIVE EXPENSE. (THIS ITEM FOR STATE USE ONLY)	\$ _____

STATE OF CALIFORNIA

COUNTY XXX)SS

Frank Keller, BEING DULY SWORN, DEPOSES AND SAYS: THAT HE IS THE COUNTY OFFICIAL RESPONSIBLE FOR THE ADMINISTRATION OF OLD AGE SECURITY IN AND FOR THE SAID COUNTY, THAT ALL OF THE PROVISIONS OF CHAPTER 1 OF DIVISION 111 OF THE WELFARE & INSTITUTIONS CODE, AND AMENDMENTS THERETO, AND TITLE 1 OF THE SOCIAL SECURITY ACT, AND AMENDMENTS THERETO, HAVE BEEN COMPLIED WITH TO THE BEST OF MY KNOWLEDGE AND BELIEF; THAT THE ABOVE EXPENDITURES WERE INCURRED IN ADMINISTERING, OR WERE ALLOCATED TO, SUCH PROGRAM; THAT I AM THE EXECUTIVE OFFICER OF THE CITY OR COUNTY AGENCY ACCREDITED AND APPROVED BY THE STATE DEPARTMENT OF SOCIAL WELFARE TO PERFORM INSPECTION AND LICENSING FUNCTIONS UNDER CHAPTER 11, DIVISION 3 OF THE WELFARE AND INSTITUTIONS CODE. THAT I HAVE FULLY COMPLIED WITH THE LAW, RULES AND REGULATIONS GOVERNING THESE INSPECTION AND LICENSING FUNCTIONS. THAT WITH REGARD TO EXPENDITURES FOR SALARIES & WAGES INCLUDED HEREIN ALL EMPLOYMENTS AND RATES ARE CORRECTLY SHOWN AND ARE BASED UPON AUTHORIZATION IN COMPLIANCE WITH THE REQUIREMENTS OF THE RULES FOR A MERIT SYSTEM OF PERSONNEL ADMINISTRATION OF THE STATE PUBLIC ASSISTANCE PROGRAM AS AUTHORIZED IN DIVISION 1, CHAPTER 1, SECTION 119.5 OF THE WELFARE & INSTITUTIONS CODE, AND AMENDMENTS THERETO.

SUBSCRIBED AND SWORN TO BEFORE ME THIS 7 DAYOF July, 19 47William JamesonTITLE Deputy County ClerkFrank Keller

SIGNATURE OF WELFARE DIRECTOR OR OFFICIAL IN CHARGE

TITLE County Welfare DirectorAPPROVED Warren Jensen
CHAIRMAN, BOARD OF SUPERVISORS

I HEREBY CERTIFY, THAT WARRANTS HAVE BEEN ISSUED, OR FUNDS ENCUMBERED, TO PROVIDE LIQUIDATION OF WELFARE ADMINISTRATIVE EXPENDITURES AS REFLECTED BY THAT AGENCY'S STATEMENT OF EXPENDITURES FOR THE MONTH.

Martin Grimes
SIGNATURE OF COUNTY AUDITOR

FORM AG 807, REVISED JANUARY, 1947
AGED ADMINISTRATIVE EXPENSE AFFIDAVIT
TO ACCOMPANY MONTHLY ADMINISTRATIVE
EXPENSE WORKSHEETS

(Section continued on next page)

646-99 (Continued)

646-99

Form Bl 807

STATE OF CALIFORNIA

FORWARD TWO COPIES TO THE
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIADO NOT WRITE IN
THIS SPACE

ADMINISTRATIVE EXPENSE AFFIDAVIT

FROM XXX COUNTY

FOR BLIND PERSONS ELIGIBLE UNDER AID TO NEEDY BLIND LAW

MONTH OF June, 1947 FISCAL YEAR
(FOR STATE USE ONLY)

AMOUNT DUE FROM FEDERAL FUNDS FOR ADMINISTRATION OF AID TO NEEDY BLIND	CORRECTED AMOUNTS (STATE USE ONLY)
1. ADMINISTRATIVE EXPENSE INCURRED FOR ALL BLIND PERSONS UNDER THE AID TO NEEDY BLIND LAW FOR THE MONTH (TOTAL COLS. 5 & 6, FORM DFA 64A)	\$ <u>412.60</u> \$
2. LESS: ADMINISTRATIVE EXPENSE INCURRED FOR BLIND PERSONS INELIGIBLE TO FEDERAL AID (TOTAL COL. 6, FORM DFA 64A)	\$ <u>51.49</u> \$
3. ADMINISTRATIVE EXPENSE INCURRED FOR BLIND PERSONS ELIGIBLE TO FEDERAL AID (ITEM 1 MINUS ITEM 2 ABOVE) (SAME AS TOTAL COL. 5, FORM DFA 64A)	\$ <u>361.11</u> \$
4. TOTAL AMOUNT DUE FROM FEDERAL FUNDS FOR ADMINISTRATIVE EXPENSE FOR AID TO NEEDY BLIND (1/2 OF ITEM 3 ABOVE)	\$ <u>180.56</u> \$

FOR STATE USE ONLY

5. FEDERAL SHARE OF ADJUSTMENTS FOR ADMINISTRATIVE EXPENSE FOR BLIND PERSONS ELIGIBLE TO FEDERAL PARTICIPATION \$
6. ADJUSTED AMOUNT DUE FROM FEDERAL FUNDS FOR ADMINISTRATIVE EXPENSE FOR AID TO NEEDY BLIND (ITEM 4 PLUS OR MINUS ITEM 5) \$

STATE OF CALIFORNIA

COUNTY XXX } ss.

Frank Keller, BEING DULY SWORN, DEPOSES AND SAYS: THAT HE IS THE COUNTY OFFICIAL RESPONSIBLE FOR THE ADMINISTRATION OF AID TO NEEDY BLIND IN AND FOR THE SAID COUNTY; THAT ALL OF THE PROVISIONS OF CHAPTERS 1 AND 3 OF PART 1 OF DIVISION V OF THE WELFARE & INSTITUTIONS CODE, AND AMENDMENTS THERETO, AND TITLE X OF THE SOCIAL SECURITY ACT, AND AMENDMENTS THERETO, HAVE BEEN COMPLIED WITH TO THE BEST OF MY KNOWLEDGE AND BELIEF; THAT THE ABOVE EXPENDITURES WERE INCURRED IN ADMINISTERING, OR WERE ALLOCATED TO, SUCH PROGRAM; THAT WITH REGARD TO EXPENDITURES FOR SALARIES & WAGES INCLUDED HEREIN ALL EMPLOYMENTS AND RATES ARE CORRECTLY SHOWN AND ARE BASED UPON AUTHORIZATION IN COMPLIANCE WITH THE REQUIREMENTS OF THE RULES FOR A MERIT SYSTEM OF PERSONNEL ADMINISTRATION OF THE STATE PUBLIC ASSISTANCE PROGRAM AS AUTHORIZED IN DIVISION I, CHAPTER 1, SECTION 119.6 OF THE WELFARE & INSTITUTIONS CODE, AND AMENDMENTS THERETO.

SUBSCRIBED AND SWORN TO BEFORE ME THIS 7 DAYOF July, 1947

William Jameson
TITLE Deputy County Clerk

Frank Keller
SIGNATURE OF WELFARE DIRECTOR OR OFFICIAL IN CHARGE
TITLE County Welfare Director
APPROVED Warren Jensen
CHAIRMAN, BOARD OF SUPERVISORS

I HEREBY CERTIFY, THAT WARRANTS HAVE BEEN ISSUED, OR FUNDS ENCUMBERED, TO PROVIDE LIQUIDATION OF WELFARE ADMINISTRATIVE EXPENDITURES AS REFLECTED BY THAT AGENCY'S STATEMENT OF EXPENDITURES FOR THE MONTH.

Martin Grimes
SIGNATURE OF COUNTY AUDITOR

CREDIT VOUCHER CLAIM
ADMINISTRATIVE EXPENSE

FORM BL 807, REVISED OCTOBER 1, 1946
BLIND ADMINISTRATIVE EXPENSE AFFIDAVIT
TO ACCOMPANY MONTHLY ADMINISTRATIVE
EXPENSE WORKSHEETS

(Section continued on next page)

646-99 (Continued)

646-99

Form Ag 807-B

STATE OF CALIFORNIA

DEPARTMENT OF SOCIAL WELFARE

FORWARD TWO COPIES TO THE
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIA

STATE OF CALIFORNIA

AGED BOARDING HOME ADMINISTRATIVE EXPENSE AFFIDAVIT

FROM XXX AGENCY

FOR AMOUNT DUE FROM FEDERAL FUNDS FOR ADMINISTRATION OF AGED PROGRAMS

FOR MONTH OF June, 1947 FISCAL YEAR
(FOR STATE USE ONLY)

AMOUNT DUE FROM FEDERAL FUNDS FOR ADMINISTRATION OF AID TO NEEDY AGED	CORRECTED AMOUNTS (STATE USE ONLY)
1. TOTAL AMOUNT PAID BY COUNTY FOR AGED BOARDING HOME ADMINISTRATION. (TOTAL OF COL. 2, DFA 640.).....	\$ <u>137.50</u> \$
2. TOTAL AMOUNT DUE FROM FEDERAL FUNDS FOR ADMINISTRATION OF AGED BOARDING HOMES (1/2 OF ITEM 1, ABOVE).....	\$ <u>68.75</u> \$

FOR STATE USE ONLY

3. FEDERAL SHARE OF ADJUSTMENTS OF ADMINISTRATIVE EXPENSE FOR AGED
BOARDING HOME ADMINISTRATION..... \$
4. ADJUSTED AMOUNT DUE FROM FEDERAL FUNDS FOR AGED BOARDING HOME
ADMINISTRATION..... \$

STATE OF CALIFORNIA

COUNTY OF XXX } ss.

I, Frank Keller, BEING DULY SWORN, DEPOSE AND SAY: THAT
I AM THE EXECUTIVE OFFICER OF THE CITY OR COUNTY AGENCY ACCREDITED AND APPROVED BY THE STATE DEPARTMENT OF
SOCIAL WELFARE TO PERFORM INSPECTION AND LICENSING FUNCTIONS UNDER CHAPTER 11, DIVISION 3 OF THE WELFARE
AND INSTITUTIONS CODE AND THAT TO THE BEST OF MY KNOWLEDGE AND BELIEF, I HAVE FULLY COMPLIED WITH THE LAW,
RULES AND REGULATIONS GOVERNING THESE INSPECTION AND LICENSING FUNCTIONS, THAT WITH REGARD TO EXPENDITURES
FOR SALARIES & WAGES INCLUDED HEREIN ALL EMPLOYMENTS AND RATES ARE CORRECTLY SHOWN AND ARE BASED UPON
AUTHORIZATION IN COMPLIANCE WITH THE REQUIREMENTS OF THE RULES FOR A MERIT SYSTEM OF PERSONNEL ADMINISTRATION
OF THE STATE PUBLIC ASSISTANCE PROGRAM AS AUTHORIZED IN DIVISION 1, CHAPTER 1, SECTION 119.5 OF THE WELFARE
& INSTITUTIONS CODE, AND AMENDMENTS THERETO, AND RECORDS SHOWING THE ABOVE COST ARE AVAILABLE FOR AUDIT OR
OTHER INSPECTION.

SUBSCRIBED AND SWORN TO BEFORE ME THIS 7 DAY Frank Keller
EXECUTIVE OFFICER OF THE ACCREDITED AGENCY

OF July, 1947 TITLE Health Officer

William Jameson

TITLE Deputy County Clerk

FORM AG 807B, JANUARY, 1947
AGED ADMINISTRATIVE EXPENSE AFFIDAVIT
TO ACCOMPANY MONTHLY ADMINISTRATIVE
EXPENSE WORKSHEETS

(Section continued on next page)

Form WS-3 (Reverse)

INSTRUCTIONS FOR FILLING OUT FORM WS-3 (DFA)

"WAR SERVICES ADMINISTRATIVE EXPENSE AFFIDAVIT"

AT THE TOP OF THE FORM INSERT THE COUNTY NAME AND MONTH COVERED IN THE SPACES PROVIDED

AMOUNT DUE FROM FEDERAL FUNDS FOR WAR SERVICES ADMINISTRATION

ITEM 1. SALARIES AND WAGES

REPORT HERE THE TOTAL AMOUNT OF ADMINISTRATIVE EXPENDITURES FOR WAR SERVICES PROGRAMS AS INCLUDED IN COLUMN 5 OR COLUMN 13 OF FORM DFA 64, "ADMINISTRATIVE EXPENSE WORKSHEET FOR ALLOCATION OF EXPENDITURES (FOR SALARIES AND WAGES ONLY)."

ITEM 2. MAINTENANCE AND OPERATION

REPORT HERE THE TOTAL AMOUNT OF ADMINISTRATIVE EXPENDITURES FOR WAR SERVICES PROGRAMS FOR MAINTENANCE AND OPERATION AS INCLUDED IN COLUMN 4 OR COLUMN 12 OF FORM DFA 64, "ADMINISTRATIVE EXPENSE WORKSHEET FOR ALLOCATION OF EXPENDITURES (FOR MAINTENANCE AND OPERATION AND CAPITAL OUTLAY)."

ITEM 3. CAPITAL OUTLAY

REPORT HERE THE TOTAL AMOUNT OF ADMINISTRATIVE EXPENDITURES FOR WAR SERVICES PROGRAMS FOR CAPITAL OUTLAY AS INCLUDED IN COLUMN 4 OR COLUMN 12 OF FORM DFA 64, "ADMINISTRATIVE EXPENSE WORKSHEET FOR ALLOCATION OF EXPENDITURES (FOR MAINTENANCE AND OPERATION AND CAPITAL OUTLAY)."

ITEM 4. TOTAL ADMINISTRATIVE EXPENDITURES DURING MONTH

REPORT HERE THE SUM OF ITEMS 1, 2, AND 3.

THE AFFIDAVIT SHALL BE DATED AND SIGNED BY THE PROPER COUNTY OFFICIALS IN THE SPACES PROVIDED.

Form WS-3

FORWARD TWO COPIES TO
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIA

STATE OF CALIFORNIA

CIVILIAN WAR ASSISTANCE ADMINISTRATIVE EXPENSE AFFIDAVIT

FROM XXX COUNTY

FOR THE MONTH ENDING June 30, 1947 (DO NOT WRITE IN THIS SPACE) FISCAL YEAR

AMOUNT DUE FROM FEDERAL FUNDS FOR CIVILIAN WAR ASSISTANCE ADMINISTRATION

1. SALARIES AND WAGES \$ 7.19
 2. MAINTENANCE AND OPERATION \$.43
 3. CAPITAL OUTLAY \$ 2.98
 4. TOTAL ADMINISTRATIVE EXPENDITURES DURING MONTH \$ 10.60

STATE OF CALIFORNIA

COUNTY XXX) SS

I, Frank Keller, BEING DULY SWORN, DEPOSE AND SAY: THE ABOVE EXPENDITURES FOR CIVILIAN WAR ASSISTANCE WERE MADE AND/OR FUNDS WERE ENCUMBERED UNDER AUTHORITY OF AND FOR THE PURPOSES SET FORTH IN THE WAR SERVICES APPROPRIATION ACT, AND IN ACCORDANCE WITH ANY LEGISLATION OR FURTHER ALLOTMENTS, INSTRUCTIONS AND STANDARDS ISSUED THEREUNDER. THIS IS TO CERTIFY THAT THE ABOVE IS A CORRECT STATEMENT OF THE EXPENDITURES AND/OR ENCUMBRANCES AND THAT PAYMENT THEREOF HAS NOT BEEN RECEIVED.

SUBSCRIBED AND SWORN TO BEFORE ME THIS 7 DAY
OF July, 1947

Frank Keller
SIGNATURE OF WELFARE DIRECTOR OR OFFICIAL IN CHARGE
TITLE County Welfare Director

TITLE Deputy County Clerk

I HEREBY CERTIFY, THAT WARRANTS COVERING THE ABOVE HAVE BEEN ISSUED AND/OR FUNDS ENCUMBERED, AND THAT RECORDS SHOWING SUCH DISBURSEMENTS AND/OR ENCUMBRANCES ARE AVAILABLE FOR AUDIT OR OTHER INSPECTION AND APPROPRIATE ACCOUNTING IS MADE OF ALL RECEIPTS AND DISBURSEMENTS REGARDING THIS PROGRAM.

Martin Grimes
SIGNATURE OF COUNTY AUDITOR

FOR STATE USE ONLY

THE ABOVE CLAIM HAS BEEN VERIFIED AGAINST ACCOMPANYING DOCUMENTARY EVIDENCE AND, SUBJECT TO FIELD AUDIT, IS APPROVED FOR PAYMENT.

SUPERVISOR, BUREAU OF AUDITS DATE _____

I HEREBY CERTIFY THAT THERE ARE SUFFICIENT FEDERAL FUNDS AVAILABLE IN THE SOCIAL WELFARE FUND RESERVE FOR CIVILIAN WAR ASSISTANCE TO FINANCE PAYMENT OF THE AMOUNT OF \$ _____ AS SHOWN IN ITEM 4

DEPARTMENTAL ACCOUNTING OFFICER DATE _____

(SEE REVERSE SIDE FOR INSTRUCTIONS)

FORM WS-3, (DFA) REVISED JULY, 1946
WAR SERVICES AFFIDAVIT TO ACCOMPANY CLAIM
FOR ADMINISTRATIVE EXPENSE

646-99 (Continued)

646-99

Form CA 807

STATE OF CALIFORNIA

DEPARTMENT OF SOCIAL WELFARE

FORWARD TWO COPIES TO THE
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIASTATE OF CALIFORNIA
FROM XXX COUNTYDO NOT WRITE IN
THIS SPACE

ADMINISTRATIVE EXPENSE AFFIDAVIT

FOR CHILDREN ELIGIBLE UNDER AID TO NEEDY CHILDREN LAW

FOR MONTH OF June, 1947 FISCAL YEAR
(FOR STATE USE ONLY)

AMOUNT DUE FROM FEDERAL FUNDS FOR ADMINISTRATION OF AID TO NEEDY CHILDREN		CORRECTED AMOUNTS (STATE USE ONLY)
1. ADMINISTRATIVE EXPENSE INCURRED FOR ALL CHILDREN'S CASES UNDER THE AID TO NEEDY CHILDREN LAW FOR THE MONTH (TOTAL COLS. 8, 9 & 10 FORM DFA 64A)	\$ 499.07	\$
2. LESS: ADMINISTRATIVE EXPENSE INCURRED FOR CHILDREN'S CASES INELIGIBLE TO FEDERAL AID (TOTAL COLS. 9 & 10, FORM DFA 64A)	\$ 167.18	\$
3. ADMINISTRATIVE EXPENSE INCURRED FOR CHILDREN'S CASES ELIGIBLE TO FEDERAL AID (ITEM 1 MINUS ITEM 2 ABOVE) (SAME AS TOTAL COL. 8, FORM DFA 64A)	\$ 331.89	\$
4. TOTAL AMOUNT DUE FROM FEDERAL FUNDS FOR ADMINISTRATIVE EXPENSE FOR AID TO NEEDY CHILDREN (1/2 OF ITEM 3 ABOVE)	\$ 165.95	\$

FOR STATE USE ONLY

5. FEDERAL SHARE OF ADJUSTMENTS FOR ADMINISTRATIVE EXPENSE FOR CHILDREN'S CASES ELIGIBLE TO FEDERAL PARTICIPATION (THIS ITEM FOR STATE USE ONLY) \$
6. ADJUSTED AMOUNT DUE FROM FEDERAL FUNDS FOR ADMINISTRATIVE EXPENSE FOR AID TO NEEDY CHILDREN (ITEM 4 PLUS OR MINUS ITEM 5) (THIS ITEM FOR STATE USE ONLY) \$

STATE OF CALIFORNIA

COUNTY XXX } ss

Frank Keller BEING DULY SWORN, DEPOSES AND SAYS: THAT HE IS THE COUNTY OFFICIAL RESPONSIBLE FOR THE ADMINISTRATION OF AID TO NEEDY CHILDREN IN AND FOR THE SAID COUNTY; THAT ALL OF THE PROVISIONS OF CHAPTER 1 OF PART 2 OF DIVISION 11 OF THE WELFARE & INSTITUTIONS CODE, AND AMENDMENTS THERETO, AND TITLE IV OF THE SOCIAL SECURITY ACT, AND AMENDMENTS THERETO, HAVE BEEN COMPLIED WITH TO THE BEST OF MY KNOWLEDGE AND BELIEF; THAT THE ABOVE EXPENDITURES WERE INCURRED IN ADMINISTERING, OR WERE ALLOCATED TO, SUCH PROGRAM; THAT WITH REGARD TO EXPENDITURES FOR SALARIES & WAGES INCLUDED HEREIN ALL EMPLOYMENTS AND RATES ARE CORRECTLY SHOWN AND ARE BASED UPON AUTHORIZATION IN COMPLIANCE WITH THE REQUIREMENTS OF THE RULES FOR A MERIT SYSTEM OF PERSONNEL ADMINISTRATION OF THE STATE PUBLIC ASSISTANCE PROGRAM AS AUTHORIZED IN DIVISION 1, CHAPTER 1, SECTION 119.5 OF THE WELFARE & INSTITUTIONS CODE, AND AMENDMENTS THERETO.

SUBSCRIBED AND SWORN TO BEFORE ME THIS 7 DAYOF July, 1947

William Jameson
TITLE Deputy County Clerk

Frank Keller
SIGNATURE OF WELFARE DIRECTOR OR OFFICIAL IN CHARGE

TITLE County Welfare Director

Warren Jensen
APPROVED CHAIRMAN, BOARD OF SUPERVISORS

I HEREBY CERTIFY, THAT WARRANTS HAVE BEEN ISSUED, OR FUNDS ENCUMBERED, TO PROVIDE LIQUIDATION OF WELFARE ADMINISTRATIVE EXPENDITURES AS REFLECTED BY THAT AGENCY'S STATEMENT OF EXPENDITURES FOR THE MONTH.

Martin Grimes
SIGNATURE OF COUNTY AUDITOR

CREDIT VOUCHER CLAIM
ADMINISTRATIVE EXPENSE

FORM CA 807, REVISED JANUARY, 1947
CHILDREN'S ADMINISTRATIVE EXPENSE AFFIDAVIT
TO ACCOMPANY MONTHLY ADMINISTRATIVE
EXPENSE WORKSHEETS

(Section continued on next page)

646-99 (Continued)

646-99

FORM DFA 117

PAGE 2

III. TERMS OF OCCUPANCY AND PROVISION OF LEASE

A. RENTED

1. DURATION OF LEASE: FROM _____, 19____ TO _____, 19____.
2. OPTION OF RENEWAL: YES _____
NO _____.
3. RENTAL COST: A. MONTHLY \$ _____
B. YEARLY \$ _____.
4. MONTHLY RENTAL COST OF \$ _____
PER SQUARE FEET.
5. DOES LEASE CONTAIN ANY PROVISION REGARDING REPAIRS AND ALTERATIONS? _____
IF ANSWER "YES"
(YES) (NO)
ATTACH EXCERPT OF THAT SECTION OF LEASE WHICH RELATES WITH SUCH REPAIRS AND ALTERATIONS.
6. WILL AGENCY OCCUPY THESE PREMISES FOR THE FULL TERM OF LEASE? _____
(YES) (NO)

B. RENT-FREE OR NOMINAL RENTAL

1. ANTICIPATED DURATION OF OCCUPANCY: _____
2. OBLIGATION OF LOCAL GOVERNMENT FOR REPAIRS: _____
3. USE VALUE: \$ _____ (LESSOR OF A AND B)
A. RENTAL OF OTHER SUITABLE SPACE WITHOUT ADDITIONAL COSTS: \$ _____
B. RENTAL VALUE OF PRESENT SPACE BEFORE REPAIRS: \$ _____
C. RENTAL VALUE OF PRESENT SPACE AFTER REPAIRS: \$ _____
4. A. IS RENTAL PAID? _____
(YES) (NO)
B. IF RENTAL PAID, HOW MUCH? \$ _____
ANNUAL
C. LIST ALL ELEMENTS INVOLVED IN THE RENTAL BASIS: _____
D. SQUARE FOOT RENTAL VALUE OF PRIVATELY OWNED BUILDING SPACE OF COMPARABLE LOCATION, CONSTRUCTION, FACILITIES, AND CONDITION IN THE LOCALITY: _____
EXPLAIN HOW SQUARE FOOT RENTAL VALUE DETERMINED: _____
- C. DESCRIBE BASIS OF PRORATING COSTS IF JOINT OCCUPANCY: _____

IV. COSTS

- A. PROPOSED COST OF ALTERATIONS AND REPAIRS: \$ _____
- B. WILL ABOVE COST REPRESENT THE ANTICIPATED TOTAL COST FOR THE DURATION OF THE LEASE?
(YES) (NO)
- C. WOULD COST OF ALTERATIONS AND REPAIRS BE LESS THAN THE COST OF RENTING OUTRIGHT OTHER FACILITIES FOR A YEAR OR LONGER? _____
(YES) (NO)
- D. WERE THE COSTS OF SIMILAR QUARTERS WITHIN THE COMMUNITY INVESTIGATED BEFORE AN AGREEMENT WAS REACHED AS TO THE AMOUNT DETERMINED TO BE THE CURRENT USE VALUE? _____
(YES) (NO)
EXPLAIN: _____

(Form Continued on Next Page)

(Section Continued on Next Page)

646-99 (Continued)

646-99

STATE OF CALIFORNIA

FORM DFA 117
DEPARTMENT OF SOCIAL WELFARE
SUBMIT 4 COPIES OF THIS FORM TO THE
STATE DEPARTMENT OF SOCIAL WELFARE

REQUEST FOR APPROVAL OF EXPENDITURES FOR REPAIRS AND ALTERATIONS

COUNTY OF _____

NAME OF DEPARTMENT _____

APPROVAL IS REQUESTED FOR EXPENDITURES FOR REPAIRS AND ALTERATIONS TO THE SPACE IN THE PREMISES OCCUPIED BY THE OFFICE OF THE COUNTY WELFARE AGENCY AT THE ADDRESS LISTED BELOW, IN ACCORDANCE WITH THE PROVISIONS OF SECTION 645-37 OF THE MANUAL OF POLICIES AND PROCEDURES.

I. NATURE OF REPAIRS AND ALTERATIONS

A. DESCRIPTION: _____

B. THE REPAIRS AND ALTERATIONS DESCRIBED ABOVE ARE OF A _____
(PERMANENT) (REMOVABLE)
NATURE AND _____ REMAIN THE PROPERTY OF THE AGENCY.
(WILL) (WILL NOT)
EXPLAIN FULLY REMOVABLE ITEMS: _____

C. DETERMINATION OF NEED FOR REPAIRS AND ALTERATIONS: _____

II. LOCATION AND DESCRIPTION OF PREMISES TO BE REPAIRED

A. LOCATION OF PREMISES _____
(STREET NUMBER) (CITY)

B. FLOOR OR ROOM NUMBERS: _____

C. SPACE: _____ SQUARE FEET

D. DESCRIPTION OF PREMISES: _____

E. IS LOCATION BEING REPAIRED OR ALTERED ADEQUATE FOR HOUSING THIS AGENCY?
(YES) (NO)

F. NAME AND ADDRESS OF LESSOR: _____

(Form Continued on Next Page)

(Section Continued on Next Page)

Form DFA 117

Page 4

CERTIFICATION

I HEREBY CERTIFY THAT TO THE BEST OF MY KNOWLEDGE THE ABOVE STATEMENTS AND INFORMATION ARE TRUE AND CORRECT.

SIGNATURE OF COUNTY OFFICER REQUESTING APPROVAL OF EXPENDITURES:

TITLE: _____

DATE: _____

DO NOT WRITE IN THIS SPACERECOMMENDATION OF
STATE DEPARTMENT OF SOCIAL WELFARE

RECOMMENDATION IS HEREBY MADE BY THE
STATE DEPARTMENT OF SOCIAL WELFARE
THAT THIS REQUEST BE _____

SIGNED: _____

TITLE: _____

DATE: _____

ACTION OF SOCIAL SECURITY ADMINISTRATION

THE REQUEST IS HEREBY _____
BY THE SOCIAL SECURITY ADMINISTRATION
FOR REPAIRS AND ALTERATIONS AS DESCRIBED
HEREIN:

SIGNED: _____

TITLE: _____

DATE: _____

NOTIFICATION TO COUNTY OF STATE DEPARTMENT OF SOCIAL WELFARE
AND FEDERAL SOCIAL SECURITY ADMINISTRATION ACTION

THIS REQUEST FOR APPROVAL OF EXPENDITURES FOR REPAIRS AND ALTERATIONS HAS BEEN _____
IN THE AMOUNT OF \$ _____ TO BE AMORTIZED OVER A PERIOD OF _____
MONTHS.

COMMENCING WITH YOUR ADMINISTRATIVE EXPENSE CLAIM (FORM DFA 64A, ADMINISTRATIVE EXPENSE WORKSHEET
FOR ALLOCATION OF EXPENDITURES BASED ON RESULTS OF TIME RECORDING FOR MAINTENANCE AND OPERATION
AND CAPITAL OUTLAY) FOR THE MONTH OF _____, 194____ AND FOR A PERIOD OF _____
ADDITIONAL CONSECUTIVE MONTHS, YOU ARE AUTHORIZED TO INCLUDE THE AMOUNT OF \$ _____ AS
"OVERALL" EXPENDITURE.

FORM DFA 117, REVISED SEPTEMBER, 1947
(SUBSTITUTE FOR FEDERAL FORM PA-117)
BUREAU OF AUDITS
APPROVAL FOR REPAIRS AND ALTERATIONS

(Section Continued on Next Page)

646-99 (Continued)

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Form DFA 117

Page 3

IV. COSTS (CONTINUED)

- E. WOULD IT BE POSSIBLE FOR COUNTY TO CONSTRUCT FOR APPROXIMATELY THE SAME AMOUNT OF MONEY, A NEW BUILDING (IF MATERIALS WERE AVAILABLE) THAT NOT ONLY WOULD HAVE BEEN MORE ADAPTED TO NEEDS OF THE COUNTY DEPARTMENT, BUT PROBABLY WOULD HAVE REQUIRED SMALLER EXPENDITURES FOR CONTINUING UPKEEP AND REPAIRS? EXPLAIN:
(YES) (NO)

- F. WOULD IT BE POSSIBLE FOR YOUR AGENCY TO FIND EQUALLY ADEQUATE QUARTERS FOR A MONTHLY EXPENDITURE LESS THAN THE AMOUNT THAT IS BEING INCURRED ON THE BASIS OF A PRORATION OF THE COST OF REPAIRS OVER THE PERIOD OF MONTHS COVERED BY THE LEASE? EXPLAIN:
(YES) (NO)

- G. IS COST OF REPAIRS AND ALTERATIONS TO BE CLAIMED IN FULL FOR FEDERAL PARTICIPATION WHEN EXPENDITURES ACTUALLY MADE, OR IS TOTAL COST TO BE AMORTIZED?

IF COST TO BE AMORTIZED, GIVE ESTIMATED AMOUNT TO BE CLAIMED FOR FEDERAL PARTICIPATION ANNUALLY:

- H. IS IT THE POLICY OF THE COUNTY THAT COSTS OF REPAIRS AND ALTERATIONS BE CHARGED TO THE APPROPRIATE DEPARTMENTAL ACCOUNTS OF OTHER DEPARTMENTS WHICH ARE NOT HOUSED IN COUNTY OWNED PROPERTY? EXPLAIN:
(YES) (NO)

- I. IS COST OF UP-KEEP OF WELFARE DEPARTMENT INCLUDED IN THE WELFARE APPROPRIATION, AND IS IT UNIFORM COUNTY PRACTICE TO PROVIDE SUCH APPROPRIATIONS FOR ALL COUNTY DEPARTMENTS WITH QUARTERS OUTSIDE OF COURT HOUSE? EXPLAIN:
(YES) (NO)

- J. ARE DEPARTMENTS THAT ARE HOUSED IN COUNTY OWNED PREMISES CHARGED A PRO-RATA SHARE OF RENT OR DOES COUNTY PROVIDE SUCH QUARTERS RENT FREE? EXPLAIN:

V. APPROVAL OF CONTRACT

- A. HAVE BIDS BEEN SECURED FROM MORE THAN ONE PERSON BEFORE APPROVAL OF CONTRACT? EXPLAIN:
(YES) (NO)

- B. HAS EVALUATION BEEN MADE OF METHODS USED FOR DETERMINING THE CONTRACTOR'S CONFORMITY WITH THE CONTRACT AND MEASURING THE AMOUNT OF WORK PERFORMED? EXPLAIN:
(YES) (NO)

(Form Continued on Next Page)

(Section Continued on Next Page)

646-99 (Continued)

646-99

Form DFA 117-A

Page 2

F. SQUARE FOOT RENTAL VALUE OF PRIVATELY OWNED BUILDING SPACE IN A COMPARABLE LOCATION, CONSTRUCTION, FACILITIES AND CONDITION IN THE LOCALITY \$ _____ PER SQUARE FOOT.

G. EXPLAIN HOW SQUARE FOOT RENTED VALUE OF OTHER SPACE DETERMINED: _____

H. IS COST OF CONSTRUCTION OR PURCHASE OF BUILDING INCLUDED IN THE WELFARE APPROPRIATION?
(YES) OR (NO)

I. IS IT UNIFORM COUNTY PRACTICE TO PROVIDE SUCH CONSTRUCTION OR PURCHASE APPROPRIATIONS FOR ALL COUNTY DEPARTMENTS WITH QUARTERS OUTSIDE OF COURT HOUSE? _____
(YES) OR (NO)

EXPLAIN: _____

III. APPROVAL OF CONTRACT (CONSTRUCTION ONLY)

A. HAVE BIDS BEEN SECURED FROM MORE THAN ONE PERSON BEFORE APPROVAL OF CONTRACT? _____
(YES) OR (NO)

EXPLAIN: _____

B. HAVE METHODS BEEN DEVELOPED FOR EVALUATING THE CONTRACTOR'S CONFORMITY WITH THE CONTRACT AND MEASURING THE AMOUNT OF WORK PERFORMED? _____
(YES) OR (NO) EXPLAIN: _____

C. WHAT IS THE ESTIMATED DATE OF COMPLETION OF CONSTRUCTION? _____

(Form Continued on Next Page)

(Section Continued on Next Page)

646-99 (Continued)

646-99

<p>STATE OF CALIFORNIA</p> <p style="text-align: center;">REQUEST FOR APPROVAL OF EXPENDITURES FOR CONSTRUCTION OR PURCHASE OF BUILDING</p> <p style="text-align: center;">WELFARE DEPARTMENT OF _____ COUNTY</p> <p>APPROVAL IS REQUESTED FOR EXPENDITURES FOR CONSTRUCTION OR PURCHASE OF BUILDING FOR COUNTY WELFARE AGENCY AT THE ADDRESS LISTED BELOW, IN ACCORDANCE WITH THE PROVISIONS OF SECTION 645-35 OF THE MANUAL OF POLICIES AND PROCEDURES.</p> <p>I. NEED FOR CONSTRUCTION OR PURCHASE</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>A. DETERMINATION OF NEED FOR CONSTRUCTION OR PURCHASE: _____</p> <p>_____</p> <p>B. CONSTRUCTION OR PURCHASE WILL BE OF A PERMANENT NATURE AND _____ (WILL) OR (WILL NOT) REMAIN THE PROPERTY OF THE COUNTY WELFARE DEPARTMENT.</p> <p>C. PROPOSED COST OF CONSTRUCTION OR PURCHASE: \$ _____</p> <p>II. LOCATION AND DESCRIPTION OF CONSTRUCTION OR PURCHASE</p> <p>A. LOCATION OF PREMISES: _____ (STREET NUMBER) _____ (CITY)</p> <p>B. NUMBER OF FLOORS: _____</p> <p>C. SPACE: _____ SQUARE FEET</p> <p>D. DESCRIPTION OF PREMISES: _____</p> <p>_____</p> <p>E. FOR WHAT AMOUNT COULD THE COUNTY LEASE OR RENT A BUILDING ADAPTED TO THE NEEDS OF THE COUNTY WELFARE DEPARTMENT WHEN THE LEASE OR RENTAL INCLUDES THE COST OF MAINTENANCE, LIGHTS, HEAT AND OTHER SERVICES? \$ _____ MONTHLY.</p> <p>FOR WHAT AMOUNT COULD THE COUNTY LEASE OR RENT A BUILDING ADAPTED TO THE NEEDS OF THE COUNTY WELFARE DEPARTMENT WHEN THE LEASE OR RENTAL DOES NOT INCLUDE THE COST OF MAINTENANCE, LIGHTS, HEAT OR OTHER SERVICES? \$ _____ MONTHLY.</p> <p>IF LEASE OR RENTAL IS AVAILABLE WITH ONE OR MORE BUT NOT ALL OF THE ABOVE SERVICES STATE THE SERVICES RENDERED AND THE MONTHLY COST. \$ _____</p> <p>_____</p>	<p>Form DFA 117-A</p> <p>DEPARTMENT OF SOCIAL WELFARE</p> <p>SUBMIT 4 COPIES OF THIS FORM TO THE</p> <p>STATE DEPARTMENT OF SOCIAL WELFARE</p>
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(Form Continued on Next Page)

(Section Continued on Next Page)

646-99 (Continued)

646-99

Form DFA 117-A
Page 3CERTIFICATION

I HEREBY CERTIFY THAT TO THE BEST OF MY KNOWLEDGE THE ABOVE STATEMENTS AND INFORMATION ARE TRUE AND CORRECT.

SIGNATURE OF COUNTY OFFICER REQUESTING APPROVAL OF EXPENDITURES:

TITLES: _____

DATE: _____

DO NOT WRITE IN THIS SPACERECOMMENDATION OF
STATE DEPARTMENT OF SOCIAL WELFARE

RECOMMENDATION IS HEREBY MADE BY THE
STATE DEPARTMENT OF SOCIAL WELFARE
THAT THIS REQUEST BE _____

SIGNED: _____

TITLES: _____

DATE: _____

ACTION OF SOCIAL SECURITY ADMINISTRATION

THE REQUEST IS HEREBY _____
BY THE SOCIAL SECURITY ADMINISTRATION
FOR CONSTRUCTION OR PURCHASE OF BUILDING
AS DESCRIBED HEREIN:

SIGNED: _____

TITLES: _____

DATE: _____

NOTIFICATION TO COUNTY OF STATE DEPARTMENT OF SOCIAL WELFARE
AND FEDERAL SOCIAL SECURITY ADMINISTRATION ACTION

THIS REQUEST FOR APPROVAL OF EXPENDITURES FOR CONSTRUCTION OR PURCHASE OF BUILDING HAS BEEN _____
IN THE AMOUNT OF \$ _____ TO BE AMORTIZED OVER A PERIOD OF _____ MONTHS.

COMMENCING WITH YOUR ADMINISTRATIVE EXPENSE CLAIM (FORM DFA 64A, ADMINISTRATIVE EXPENSE WORKSHEET
FOR ALLOCATION OF EXPENDITURES BASED ON RESULTS OF TIME RECORDING FOR MAINTENANCE AND OPERATION AND
CAPITAL OUTLAY) FOR THE MONTH OF _____, 194____ AND FOR A PERIOD OF _____
ADDITIONAL CONSECUTIVE MONTHS, YOU ARE AUTHORIZED TO INCLUDE THE AMOUNT OF \$ _____ AS
"OVERALL" EXPENDITURE.

FORM DFA 117-A, SEPTEMBER 1947
BUREAU OF AUDITS
APPROVAL FOR CONSTRUCTION OR PURCHASE OF BUILDING

655-99 (Continued)

655-99

FORM CA 801-I—STATE OF CALIFORNIA

DEPARTMENT OF SOCIAL WELFARE

Monthly Claim for State Aid to Needy Children

*As Provided in Chapter 1 of Part 2 of Division 2 of the Welfare and Institutions Code and Amendments Thereto*SUPPORTED BY _____ (Name of Institution) } Institution
California

ADDRESS _____ (Address of Institution)

For the Month Ending December 1947

(1) DEPARTMENT OF SOCIAL WELFARE NUMBER	(2) NAME OF CHILD Family Given	(3) WHEN AID CEASED DATE	(4) AMOUNT RECEIVED FOR SPECIFIC SUPPORT OF CHILD OTHER THAN FROM PUBLIC FUNDS FOR TIME CLAIMED	(5) TIME CLAIMED DAYS	(6) DUE FROM STATE FOR ABOVE MONTH	(7) REASON FOR CORRECTION (Reserved for State Department of Social Welfare)
1	SMITH, Charles		-0-		24.00	1
2	JONES, Virginia		-0-	25	19.35	2
3	ROGERS, Roy		5.00		24.00	3
4	HOFFMAN, Sally	1/28	-0-	28	21.68	4
						5
						6
						7
					89.03	8
						9
						10
						11
						12
						13
						14
						15
						16
						17
						18
						19
						20
						21
						22
						23
						24
						25
						26
						27
						28
						29
						30

SUPPLEMENT FOR PRIOR MONTHS

OCTOBER, 1947

4 HOFFMAN, Sally

24.00

NOVEMBER, 1947

4 HOFFMAN, Sally

24.00

Submit in Duplicate to the State Department of Social Welfare, Sacramento, at the End of Each Calendar Month.

TO BE ACCOMPANIED BY AFFIDAVIT FORM CA 800-I

Page No. _____

FORM CA 801-I—January, 1943

655-99 Institutional Aid Claim Forms

655-99

ANC

Form CA 800-I

STATE OF CALIFORNIA

FORWARD TWO COPIES TO
STATE DEPARTMENT OF SOCIAL WELFARE
SACRAMENTO, CALIFORNIA

AID AFFIDAVIT

From (Name of Institution)
Give full name of institution

Address (Address of Institution)

For the support of

NEEDY CHILDREN MAINTAINED IN INSTITUTIONS

(AS PROVIDED UNDER SECTION 1557 OF THE WELFARE AND INSTITUTIONS CODE)

Month of December 1947 Fiscal Year
(STATE USE ONLY)

	TOTAL NUMBER OF CHILDREN REPORTED	AMOUNT CLAIMED FROM STATE (TOTAL COLUMN 6, FORM CA 801-I)
FOR CURRENT MONTH	4	\$ 89.03
FOR PRIOR MONTHS	2	\$ 48.00
	TOTAL	\$ 137.03

(APPROVAL STAMP)

STATE OF CALIFORNIA)
County of XXX) ss

I, Jane Doe, being duly sworn, depose and say:

That I am the Superintendent of the aforesaid institution;
that the names of the orphans, half-orphans, abandoned children, and children of
incapacitated or tuberculous fathers for whom support is claimed are correctly
listed on the attached claim; that the total number of children and the amount
claimed are true and correct as reported above; and that, to the best of my
knowledge and belief, the authorities of the institution have complied with all
the provisions of Chapter 1 of Part 2 of Division II of the Welfare and Institu-
tions Code and amendments thereto.

(Signature)

Jane Doe

Subscribed and sworn to before me this 31st day of December, 1947

Richard Roe

Notary Public

Title

(Seal)

FORM CA 800-I, EFFECTIVE JANUARY 1, 1944
INSTITUTION AFFIDAVIT TO ACCOMPANY
MONTHLY CLAIM FOR AID (FORM CA 801-I)

CASH CLAIM-AID

(Section continued on next page)

674-99 (Continued)

674-99

Form BL 808
STATE OF CALIFORNIA

DEPARTMENT OF SOCIAL WELFARE

(SEE SEC. 672-50, EXAMPLE C)

CHECK TYPE

COLLECTION

ADJUSTMENT

X

NOTICE OF REPAYMENT
AID TO BLINDTO STATE DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO, CALIFORNIACOUNTY XXXX
DATE NOVEMBER 21, 1947
NAME BROWN, HELEN
STATE NO. 2
COUNTY NO. 31DATE REPAYMENT RECEIVED BY COLLECTION OFFICER NOVEMBER 16, 19 47
DATE REPAYMENT DEPOSITED WITH COUNTY TREASURER NOVEMBER 16, 19 47
PERIOD(S) FOR WHICH AID COLLECTED WAS PAID MARCH, 1947
TOTAL AMOUNT OF REPAYMENT \$26.00
NET AMOUNT TO BE REFUNDED TO UNITED STATES GOVERNMENT 3.00
NET AMOUNT TO BE REFUNDED TO STATE OF CALIFORNIA 11.50
NET AMOUNT TO BE REFUNDED TO COUNTY 11.50

SOURCE OF AND REASONS FOR REPAYMENT (GIVE FULL EXPLANATION)

RESPONSIBLE RELATIVE

	<u>TOTAL</u>	<u>FEDERAL</u>	<u>STATE</u>	<u>COUNTY</u>
CLAIMED MARCH, 1947	\$65.00	\$25.00	\$20.00	\$20.00
SHOULD HAVE CLAIMED	39.00	22.00	8.50	8.50
DISTRIBUTION OF ADJUSTMENT	\$26.00	\$ 3.00	\$11.50	\$11.50

DEDUCTION TO BE MADE FROM BLIND CLAIM FOR MONTH OF NOVEMBER, 19 47(SIGNATURE OF
COLLECTION OFFICER)John Doe

COUNTY--TO BE USED FOR ONE CASE ONLY

SEND ONE COPY TO STATE DEPARTMENT OF SOCIAL WELFARE AT SACRAMENTO

FORM BL 808 (FORMERLY BL 47-DFA) JUNE, 1942

(Section Continued on Next Page)

Form Ag 808

STATE OF CALIFORNIA DEPARTMENT OF SOCIAL WELFARE

NOTICE OF REPAYMENT
OLD AGE SECURITY

(SEE SEC. 672-50, EXAMPLE A)

CHECK TYPE

COLLECTION	
ADJUSTMENT	X

COUNTY XXXX

DATE NOVEMBER 7, 1947

NAME DAWSON, ALBERT

STATE No. 1002

COUNTY No. 975

TO STATE DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO, CALIFORNIA

DATE REPAYMENT RECEIVED BY COLLECTION OFFICER NOVEMBER 3, 1947

DATE REPAYMENT DEPOSITED WITH COUNTY TREASURER NOVEMBER 6, 1947

PERIOD(S) FOR WHICH AID COLLECTED WAS PAID DECEMBER, 1946

TOTAL AMOUNT OF REPAYMENT \$20.00

NET AMOUNT TO BE REFUNDED TO UNITED STATES GOVERNMENT 5.00

NET AMOUNT TO BE REFUNDED TO STATE OF CALIFORNIA 12.50

NET AMOUNT TO BE REFUNDED TO COUNTY 2.50

SOURCE OF AND REASONS FOR REPAYMENT: (GIVE FULL EXPLANATION)

EXCESS INCOME

	<u>TOTAL</u>	<u>FEDERAL</u>	<u>STATE</u>	<u>COUNTY</u>
CLAIMED DECEMBER 1946	\$55.00	\$25.00	\$25.00	\$ 5.00
SHOULD HAVE CLAIMED	35.00	20.00	12.50	2.50
DISTRIBUTION OF ADJUSTMENT	\$20.00	\$ 5.00	\$12.50	\$ 2.50

DEDUCTION TO BE MADE FROM AGED CLAIM FOR MONTH OF NOVEMBER 1947

(SIGNATURE OF
COLLECTION OFFICER) John Doe

COUNTY--TO BE USED FOR ONE CASE ONLY

SEND ONE COPY TO STATE DEPARTMENT OF SOCIAL WELFARE AT SACRAMENTO

FORM AG 808 (REVISED), DECEMBER 1941

(Section Continued on Next Page)

674-99 (Continued)

674-99

FORM CA 808, REVISED DECEMBER, 1946
(FORMERLY CA 53-DFA)
STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
NOTICE OF REPAYMENT

Form CA 808

CHECK TYPE

NOTICE OF REPAYMENT
AID TO NEEDY CHILDREN

COLLECTION

ADJUSTMENT

X

(SEE SEC. 672-50, EXAMPLE E)

COUNTY XXXX

DATE DECEMBER 18, 1947

NAME JOHNSON, ROSE

STATE No. 4

COUNTY No. 101

TO STATE DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO, CALIFORNIA

DATE REPAYMENT RECEIVED BY COLLECTION OFFICER DECEMBER 5 19 47

DATE REPAYMENT DEPOSITED WITH COUNTY TREASURER DECEMBER 8 19 47

PERIOD(S) FOR WHICH AID COLLECTED WAS PAID DECEMBER, 1946

TOTAL AMOUNT OF REPAYMENT \$35.00

NET AMOUNT TO BE REFUNDED TO UNITED STATES GOVERNMENT 3.25

NET AMOUNT TO BE REFUNDED TO STATE OF CALIFORNIA 21.17

NET AMOUNT TO BE REFUNDED TO COUNTY 10.58

SOURCE OF AND REASONS FOR REPAYMENT: (GIVE FULL EXPLANATION)

EXCESS INCOME

	<u>TOTAL</u>	<u>FEDERAL</u>	<u>STATE</u>	<u>COUNTY</u>
CLAIMED DECEMBER 1946 (2 EL. CHILDREN)	\$67.50	\$22.50	\$30.00	\$15.00
SHOULD HAVE CLAIMED	32.50	19.25	8.83	4.42
DISTRIBUTION OF ADJUSTMENT	\$35.00	\$ 3.25	\$21.17	\$10.58

DEDUCTION TO BE MADE FROM CHILDREN'S AID CLAIM FOR MONTH OF DECEMBER 19 47

(SIGNATURE OF
COLLECTION OFFICER)*John Doe*

COUNTY--TO BE USED FOR ONE CASE ONLY

SEND ONE COPY TO STATE DEPARTMENT OF SOCIAL WELFARE AT SACRAMENTO

GIFT DEED--See Deed.

GRANT--A transfer of property, real or personal, by deed or writing. In personal property "grant" is often used as an equivalent to assignment as distinguished from a gift.

GRANT DEED--See Deed.

GRANTEE

1. The person to whom a grant or conveyance is made.
2. The person on whose eligibility a grant of aid is based.

GRANTOR--The person who makes a grant or conveyance.

GRUBSTAKE CONTRACTS and PROSPECTING AGREEMENTS entered into after September 19, 1939, which may in any way affect the title of mining locations, or other locations under the mining laws of this State, are void and of no effect unless the instrument has first been recorded in office of county recorder of county in which instrument is made. Grubstake contracts and prospecting agreements, duly acknowledged before a notary public or other person competent to take acknowledgements shall be prima facie evidence in all courts in this State in all cases wherein title to mining locations and other locations under the mining laws of this State are in dispute.

FORECLOSURE--See Mortgage

FRAUD--is either actual or constructive

Actual fraud occurs when a person has knowledge of certain facts, knows that these facts are material to the establishment of his eligibility, and proceeds to withhold or misrepresent these facts with the intention of obtaining aid to which he is not legally entitled.

Constructive fraud occurs when a person has knowledge of certain facts but does not know that these facts are material to the establishment of his eligibility and, therefore, without fraudulent intent, withholds these facts, which withholding results in the receipt of aid to which he is not legally entitled.

FREEHOLD--An undetermined estate in real property.

GENDER--Masculine gender includes feminine and neuter.

GIFT--A transfer of personal property made voluntarily and without consideration.

Three essential elements of a gift are:

1. Interest on part of donor having capacity or contract to make an unconditional gift.
2. Actual or symbolical delivery of thing to the donee such as to relinquish all control by the donor. (This is for the purpose of passing titles.) Actual delivery is not necessary where the property is incapable of delivery, or where it is already in the possession of the donee, provided donor parts with dominion over the property.
3. The donee must signify his acceptance except where it may be presumed. Where gift is to his advantage and he has knowledge thereof acceptance may be presumed.

A donor may make a valid gift of property reserving to himself a life interest in, or a life income from the property given or dividends, or interest for life on a sum given.

A verbal gift is not valid unless the means of obtaining possession and control of the thing are given nor if it is capable of delivery, unless there is an actual or symbolical delivery of the thing to the donee.

A power of revocation may be reserved in a gift of personal property; otherwise a gift other than a gift in view of death cannot be revoked by the giver.

A gift made in view of death, i.e., in contemplation, fear, or peril of death and with intent that it shall take effect only in case of the death of the giver, may be revoked at any time and is revoked by the donor's recovery from the illness or escape from the peril under which it was made. Any gift made during the last illness of the giver, or under circumstances which would naturally impress him with an expectation of speedy death, is presumed to be a gift in view of death.

A mortgage must be in writing. No particular form is required; the statutory form which may be used is very simple. Mortgages of real property are acknowledged, certified, and recorded in the same manner as grants of real property.

Every transfer of an interest in property, other than in trust, made only as a security for the performance of another act, is to be deemed a mortgage (except in cases of pledge of personal property). The burden of proof is on the party asserting that the deed is a mortgage, and the evidence must be clear and convincing in order to establish the fact. The test is whether there was an existing obligation at the time; but it need not be evidenced by a writing.

In California, there are two distinct forms of transactions involving land as security: mortgages and deeds of trust. The deed of trust is an anomaly, chiefly for the reason that it is an established principle, expressed in the codes, that a deed intended as security will be construed as a mortgage. But, in spite of this inconsistency, the deed of trust was recognized as a valid form of security at an early date, before the adoption of the codes. Later cases also upheld its validity, and today it is well established and is far more widely used than the mortgage.

Lien theory of mortgage--The deed of trust is thrown into strong contrast with the mortgage, because in California the common law title theory of mortgage has not been adopted. At common law, the mortgagee received title, subject to defeasance by a condition subsequent, the payment of the debt by the mortgagor. In California, no title passes by the mortgage; the mortgagee acquires only a lien.

Mortgage compared with deed of trust--In contrasting the ordinary mortgage (without power of sale) with the deed of trust, the following are said to be the chief differences:

A. MORTGAGE		B. DEED OF TRUST
1. PARTIES	TWO PARTIES, MORTGAGOR AND MORTGAGEE. D, THE DEBTOR-MORTGAGOR, GIVES C, THE CREDITOR MORTGAGEE, A LIEN UPON THE PROPERTY OF D AS SECURITY FOR AN OBLIGATION OWED TO C.	USUALLY THREE PARTIES, TRUSTOR, TRUSTEE AND BENEFICIARY. D, THE DEBTOR-TRUSTOR, CONVEYS THE TITLE TO HIS PROPERTY TO T, TRUSTEE, TO BE RECONVEYED TO D IF HE PERFORMS HIS OBLIGATION, BUT IN CASE HE FAILS TO PERFORM, TO BE SOLD FOR THE SATISFACTION OF D'S OBLIGATION TO C, THE CREDITOR-BENEFICIARY.
2. TITLE	REMAINS WITH THE MORTGAGOR UNTIL FORECLOSURE SALE, THEN IT PASSES FROM THE MORTGAGOR TO THE PURCHASER.	PASSES TO TRUSTEE WHO HOLDS IT UNTIL DEFAULT, THEN, AFTER SALE, IT GOES FROM TRUSTEE TO PURCHASER.
3. STATUTE OF LIMITATIONS	ACTION TO FORECLOSE THE MORTGAGE IS BARRED WHEN THE STATUTE HAS RUN ON THE PRINCIPAL OBLIGATION.	RIGHTS OF THE CREDITOR AGAINST THE PROPERTY ARE NEVER BARRED, FOR THE TRUSTEE HAS TITLE AND CAN ALWAYS SELL.
4. REMEDIES	THE ONLY REMEDY OF THE MORTGAGEE IS FORECLOSURE UNLESS THE MORTGAGE PROVIDES FOR A POWER OF SALE.	ALTERNATIVE REMEDIES OF SALE OR FORECLOSURE ARE NOW PERMITTED.
5. REDEMPTION	IN ADDITION TO THE EQUITY OF REDEMPTION, THE MORTGAGOR HAS THE STATUTORY RIGHT OF REDEMPTION FOR ONE YEAR.	THE DEBTOR HAS A LIMITED RIGHT OF REINSTATEMENT OF THE LOAN AFTER DEFAULT, BUT NO RIGHT OF REDEMPTION, THE SALE IS ABSOLUTE.
6. DEFICIENCY JUDGMENT	A DEFICIENCY JUDGMENT, IF PROPER, MAY BE ENTERED IN THE FORECLOSURE SUIT.	AFTER SALE, A SEPARATE ACTION MUST BE BROUGHT FOR THE DEFICIENCY, UNLESS THE REMEDY OF FORECLOSURE IS EMPLOYED.

MINERAL RIGHTS AND LEASES--See Real Property

MINING CLAIMS, TUNNEL RIGHTS AND MILL SITES--Under California law, a mining claim is an interest in real property and, even though unpatented, constitutes a possessory interest subject to inheritance or transfer by quit-claim deed.

Any person, a citizen of the U.S., or who has declared his intention to become a citizen, who discovers a vein or lode of quartz, or other rock in place, bearing gold, silver, cinnabar, lead, tin, copper, or other valuable deposit, may locate a claim upon such vein or lode. The proprietor of a vein or lode or mine, or the owner of a quartz mill or reduction works, or any person qualified by laws of the U.S. may locate not more than five acres of nonmineral land as a mill site. Location shall be made in the same manner as required for locating placer claims.

Within 30 days after posting his notice of location upon a lode, mining claim, placer claim, tunnel right or location, or mill site claim or location, locator shall record a true copy of the notice in office of county recorder of county in which such claim is situated.

Claims which are conveyed by patent are termed patented mining claims. In the sense used in this Manual, a patent is an instrument by which the State or Federal Government conveys land upon compliance with certain requirements. Claims which have not been conveyed are called unpatented claims.

See also Grubstake Contracts

MINORS--All persons under 21 years of age, except that a female of the age of 18 or over who is lawfully married is deemed to be of the age of majority and an adult for the purpose of entering into any engagement or transaction respecting property or her estate, or any contract.

Minor's property--Although parent of child is entitled to its custody, services and earnings, this right does not extend to child's property, and parent, as such, has no control over property, real or personal, of child.

See also Custody.

MISTAKE OF FACT--occurs when a person has no knowledge (because of unconscious ignorance) of certain facts which are material to the establishment of his eligibility and, therefore, withholds these facts, which withholding results in the receipt of aid to which he is not legally entitled; OR when the administering agency to which the material facts have been reported erroneously disregards or misinterprets these facts, which results in the payment of aid to which the recipient is not legally entitled.

MORTGAGE--Any interest in real property which is capable of being transferred may be mortgaged. If the mortgage is made on property which the mortgagor does not own, and he afterwards acquires title, the after-acquired title inures to the benefit of the mortgagee as security. Such a mortgage of property to be afterwards acquired is valid.

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Certified as a Regulation (or as
Regulations) of the

Dept of Soc. Wel.
(Name of State Agency)

Wm. S. Blumberg
(Signature)

Director
(Title)

1/6/47
(Date)

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EARL WARREN
GOVERNOR
STATE OF CALIFORNIA

DEPARTMENT OF SOCIAL WELFARE

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento
October 3, 1947

W410/20

FILED

in the office of the Secretary of State
of the State of California

NOV 10 1947

At 1:10 o'clock P. M.

FRANK D. JORDAN, Secretary of State

By *Frank D. Jordan*
Assistant Secretary of State

DEPARTMENT BULLETIN NO. 313 (WS)

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DEPARTMENTS
COUNTY AUDITORS

Subject: Revision of Scope and
Termination of the Civilian
War Assistance Program

The following instructions received from the Social Security Administration supersede those issued in all previous Department Bulletins:

You have been notified that plans are being made to liquidate the Civilian War Assistance program by June 30, 1948, and that certain modifications in eligibility requirements and changes of policy would be in effect during the liquidation period. It has now become apparent that previous plans for liquidation must be revised in order to conserve sufficient funds to continue the most essential operations under the program throughout the fiscal year. Assistance and/or service will now be available only for debarkation and embarkation operations.

Effective November 1, 1947, the coverage of the Civilian War Assistance program will be limited to the following:

1. Return transportation from San Francisco to Hawaii or the Philippines for individuals who applied prior to October 1, 1947.
2. Assistance covering transportation of Philippine or Hawaiian returnees to San Francisco and an allowance to cover 2 days' assistance while awaiting embarkation. If additional assistance beyond the 2 days is necessary, San Francisco County may grant assistance for a period of 1 week while the returnees are in San Francisco awaiting transportation to the Philippines or Hawaii.
3. In port cities, pier service, reception service, and assistance in transportation may be provided repatriates in need of these services. For persons not locating in the port city temporary maintenance may be given for a period not to exceed 3 days. This service will be made available only after notification is received from the Department of State that a ship is scheduled to arrive at the port. Specific authorization to extend service will then be given by the Bureau of Public Assistance.

The coverage listed above eliminates the former provision for three months' assistance and all cases shall be discontinued by October 31.

Very sincerely yours,

Charles M. Wollenberg

CHARLES M. WOLLENBERG, Director
State Department of Social Welfare

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Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento 14
November 6, 1947

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BERKELEY

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

IN REPLY PLEASE REFER
TO:

My dear Mr. Jordan:

Attached are three copies of regulations issued by the State Department of Social Welfare in Department Bulletin Number 313 (WS). The regulations were adopted by the State Social Welfare Board pursuant to the powers conferred upon by the Welfare and Institutions Code under Sections 103 and 120 and are being filed in accordance with provisions of Section 11381 of the Government Code.

These regulations are to be effective immediately upon filing with the Secretary of State since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare, notice and public procedure thereon being impracticable, unnecessary or contrary to the public interest.

Very sincerely yours,

Charles M. Wollenberg
23m

CHARLES M. WOLLENBERG, Director
Department of Social Welfare

206:b5
Attachment

FILED

in the office of the Secretary of State
of the State of California

NOV 10 1947

At 1:10 o'clock P. M.

FRANK M. JORDAN, Secretary of State

By *Frank M. Jordan*
Assistant Secretary of State